

Microsoft[®] **Word 2019 & 365**

LEVEL 2 OF 3

BEN LINFORD

Southwest Applied Technology College
and Southern Utah University

Microsoft Word 2019 & 365: Level 2 of 3

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EVALUATION ONLY

Preface

This textbook is part of our new approach to learning for introductory computer courses. We've kept the best elements of our proven, easy-to-use instructional design and added interactive elements and assessments that offer enormous potential to engage learners in a new way.

Why Did We Write This Content?

In today's digital world, knowing how to use the most common software applications is critical, and those who don't are left behind. Our goal is to simplify the entire learning experience and help every student develop the practical, real-world skills needed to be successful at work and in school. Using a combination of text, videos, interactive elements, and assessments, we begin with fundamental concepts and take learners through a systematic progression of exercises to achieve mastery.

What Key Themes Did We Follow?

We had conversations with dozens of educators at community colleges, vocational schools, and other learning environments in preparation for this textbook. We listened and adapted our learning solution to match the needs of a rapidly changing world, keeping the following common themes in mind:

Keep it about skills. Our content focus is on critical, job-ready topics and tasks, with a relentless focus on practical, real-world skills and common sense. We use step-by-step instructional design to ensure that learners stay engaged from the first chapter forward. We've retained our proven method of progressively moving learners through increasingly independent exercises to ensure mastery—an approach that has successfully developed skills for more than 25 years.

Keep it simple. Our integrated solutions create a seamless experience built on a dynamic instructional design that brings clarity to even the most challenging topics. We focus our content on the things that matter most and present it in the easiest way possible. Concise chunks of text are combined with visually engaging and interactive elements to increase understanding for all types of learners.

Keep it relevant. Fresh, original, and constantly evolving content helps educators keep pace with today's student and work environments. We reviewed every topic for relevancy and updated it where needed to offer realistic examples and projects for learners.

How Do I Use This Book?

Our comprehensive learning solution consists of a print textbook, a groundbreaking interactive ebook, and our easy-to-use eLab course management tool featuring additional learning content, such as overviews and video tutorials, and assessment content. Our interactive ebook contains learning content delivered in ways that will engage learners.

The eLab assessment solution includes Project Grader exercises for most chapters that are automatically graded by the system, in addition to clear feedback and analytics on student actions.

Included with Your Textbook Purchase

Depending on your purchase option, some or all of the following are included with your textbook:

Interactive ebook: A dynamic, engaging, and truly interactive textbook that includes elements such as videos, self-assessments, slide shows, GIFs, and other interactive features. Highlighting, taking notes, and searching for content is easy.

eLab Course Management System: A robust tool for accurate assessment, tracking of learner activity, and automated grading that includes a comprehensive set of instructor resources. eLab can be fully integrated with your LMS, making course management even easier.

Instructor resources: This course is also supported on the Labyrinth website with a comprehensive instructor support package that includes detailed lesson plans, lecture notes, PowerPoint presentations, a course syllabus, test banks, additional exercises, and more.

Student Resource Center: The exercise files that accompany this textbook can be found within eLab and in the Student Resource Center, which may be accessed from the ebook or online at:

labyrinthelab.com/office19

We're excited to share this innovative, new approach with you, and we'd love you to share your experience with us at: lablearning.com/share

Visual Conventions

This book uses visual and typographic cues to guide students through the lessons. Some of these cues are described below:

Cue Name	What It Does
Type this text	Text you type at the keyboard is printed in this typeface.
Action words	The important action words in exercise steps are presented in boldface.
Ribbon	Glossary terms are highlighted with a yellow background.
  	Tips, notes, and warnings are called out with special icons.
	Videos, WebSims, and other ebook or online content are indicated by this icon.
Command → Command → Command → Command	Commands to execute from the Ribbon are presented like this: Ribbon Tab→Command Group→Command→Subcommand.
 Design → Themes → Themes 	These notes present shortcut steps for executing certain tasks.

Display Settings

Multiple factors, including screen resolution, monitor size, and window size, can affect the appearance of the Microsoft Ribbon and its buttons. In this textbook, screen captures were taken at the native (recommended) screen resolutions in Office 2019 running Windows 10, with ClearType enabled.

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WORD

6

Using Themes



Themes are the most efficient way to apply formatting. They allow you to create and customize personal aesthetic choices, keep documents consistent, and apply mass formatting changes with a single click. Other tools, such as Quick Parts and Building Blocks, or your own custom templates, allow you to take this efficient personalization approach to a whole new level. In this chapter, you will build a customized theme. You will also use built-in and custom Quick Parts and Building Blocks. Finally, you will use all these tools to create custom templates.

LEARNING OBJECTIVES

- ▶ Customize a theme
- ▶ Create personalized color and font sets
- ▶ Add Quick Parts and Building Blocks to a document
- ▶ Insert cover pages
- ▶ Apply custom Building Blocks across documents
- ▶ Create and use personal Templates
- ▶ Customize the default font

Project: Creating a Client Newsletter

As a leading pediatric facility, Raritan Clinic East stays ahead of the curve by updating its protocols with the latest discoveries. It stays in regular contact with its patient population through a monthly newsletter. As an administrator for the clinic, you have been tasked with finding ways to make the newsletter creation process more efficient. Now that you've wrapped up the content for November's newsletter on meningitis, you will use the document to create and save custom themes, Quick Parts, and Building Blocks into a final template, which can be used for future newsletters.

Six Tips for an Effective Newsletter

A newsletter is an effective way to keep in touch with clients. It adds a personal touch that can create a bond between your organization and the reader. Follow these guidelines when composing a newsletter:

- ▶ Know your audience.
- ▶ Have a compelling opening line.
- ▶ Use a clean, simple layout with plenty of white space.
- ▶ Be informative and educational, and provide true value.
- ▶ Use graphics, but don't overdo it.
- ▶ Insert headings and subheadings to organize your information into easy-to-read segments.

Using Themes and Style Sets

Themes and **style sets** are document-level formatting features that can instantly add color and visual variety to your entire document. A theme is a combination of colors, fonts, and graphic elements that you can apply to any document. Style sets change font and paragraph properties. Themes and style sets create the biggest impact when you use built-in styles.

 Design→Document Formatting→Themes 

 Design→Document Formatting→Style Sets gallery

Customizing a Theme

You can customize any theme to match your creative side. Changing a theme font changes any text formatted with fonts that have (Headings) or (Body) next to their names in the font list. Calibri Light (Headings) and Calibri (Body) are the theme fonts for the default Office theme. When you change the theme, the associated theme fonts change. You can also customize the theme color.

Note!

Any customizations you make to themes are not document specific; they will be applied to your copy of Microsoft Word. These custom themes can be deleted simply by right-clicking on the custom theme thumbnail and choosing Delete.

DEVELOP YOUR SKILLS: W6-D1

In this exercise, you will use a *Childhood Diseases Seminar* handout, which uses Word's built-in styles, to try out some theme options. A cover page has been added for you. You will use *Live Preview* to examine a variety of themes and style sets, and you will also apply a new theme and style set to your report.

Before You Begin: Download the student exercise files from your eLab course or the Student Resource Center (labyrinthlab.com/office19) and determine your file storage location before beginning this exercise.

1. Open **W6-D1-SickKids** from your **Word Chapter 6** folder and save it as:
W6-D1-SickKidsRevised
2. Scroll to page 1 of the main document (not the cover page) and position the insertion point in the *Raritan Clinic East* heading.
Notice that the built-in Title style is highlighted in the Styles task pane. You may have to click More  to see it.
3. Position the insertion point in the *Childhood Diseases Seminar* subheading and see that the built-in Heading 1 style is active in the Styles task pane.
4. Examine the other headings, and you can see that built-in styles have been applied.
Remember, themes and style sets are most effective when using the built-in styles.
5. Scroll up to the cover page and choose **Design**→**Document Formatting**→**Themes**  **menu button** ▼ to display the Themes gallery.
6. Hover the mouse pointer over several different themes and observe the changes in your document.
7. Choose the **Frame** theme.
8. Scroll through the document to see the impact of the new theme.
The built-in headings in the body of the document respond to the change in theme.

Change the Theme Color and Font

9. Scroll so that the bottom of the cover page and the top of page 1 are both visible.
10. Choose **Design**→**Document Formatting**→**Colors**  **menu button** ▼.

Note!

As you change theme colors, the colors on the menu button change as well. The theme and font buttons also change as you customize their features.

11. Use **Live Preview** to examine the different color schemes to see their effects and then choose **Blue Warm**.
12. Choose **Design**→**Document Formatting**→**Fonts**  **menu button** ▼.
13. Use **Live Preview** to examine the font options and then choose **Franklin Gothic**.

Change the Style Set

14. Choose **Design**→**Document Formatting** and then click **More**  to open the Style Sets gallery.
15. Use **Live Preview** to examine the different Style Sets and then choose **Centered**.
16. Scroll through the document to see the changes.
17. Save the file.

Note!

Always leave your file open at the end of an exercise unless instructed to close it.

Create Custom Color and Font Sets

Besides using Word's built-in style sets, you can also create your own customized color and font sets from scratch. These fully customized **color sets** and **font sets** can make your documents shine with your personal flair. To create customized colors, you enter Red, Green, and Blue values that together create a final color, the digital equivalent of a painter mixing colors on a palette. Once you've made all these changes to the original theme, you can then save them as your own customized theme in the default Document Themes folder. Doing so causes your theme to appear in the Themes menu. Once saved, you can apply your personal themes to documents in the same way you apply built-in themes.

☰ Design→Document Formatting→Colors→Customize Colors

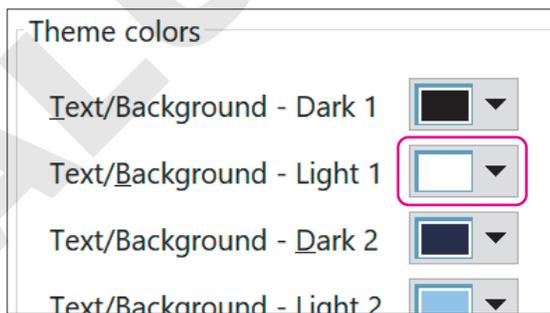
☰ Design→Document Formatting→Fonts→Customize Fonts

☰ Design→Document Formatting→Themes→Save Current Theme

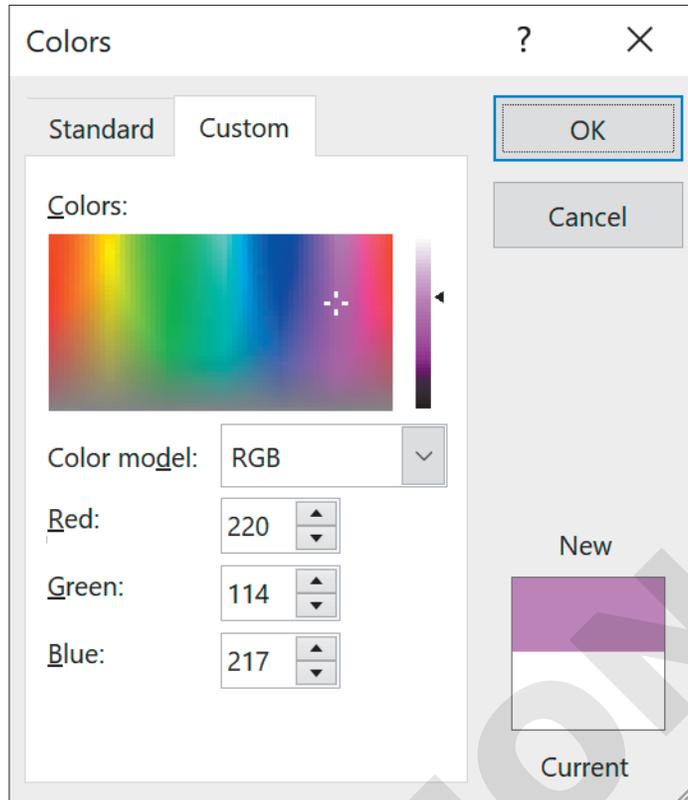
DEVELOP YOUR SKILLS: W6-D2

In this exercise, you will use the Childhood Diseases Seminar handout to create customized color and font sets for Raritan Clinic. For the color set, you'll use the same colors you see in the company logo. You will apply your custom sets to your document and save these choices in a new theme. Finally, you'll apply your custom theme to the monthly newsletter.

1. Save your file as: **W6-D2-SickKidsRevised**
2. If necessary, scroll so the bottom of the cover page and the top of page 1 are both visible.
You will begin by creating a custom color set.
3. Choose **Design→Document Formatting→Colors**  **menu button** ▼ → **Customize Colors**.
In the Create New Theme Colors dialog box, the various boxes correspond to the colors used throughout the theme, including title text, graphics like the horizontal lines above and below the title, shapes, and more.
4. In the Create New Theme Colors dialog box, select the **Text/Background - Light 1** menu **button** ▼ and choose **More Colors**.



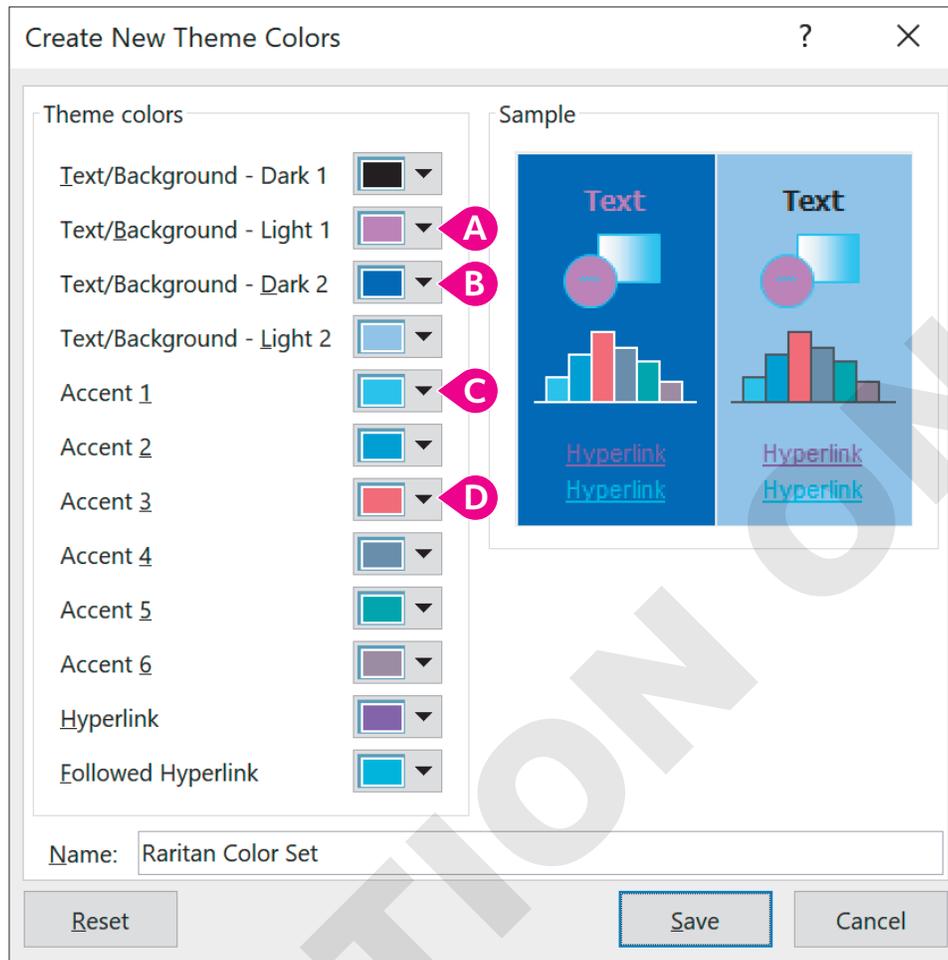
5. In the Colors box, choose the **Custom** tab, if necessary, and enter these numbers into the boxes for Red, Green, and Blue to get a lavender color:



These numbers correspond to a value of how much red, green, and blue make up this lavender color, seen as the outline of the heart shape in the Raritan logo. The color values range from 0 to 255. In this color, there's a lot of red and blue, but only about half as much green. Most companies will have the RGB values of their company colors, such as this color set, on hand for branding needs.

6. Click **OK** to close the Colors box.
7. Click the **Text/Background - Dark 2 menu button** ▼, choose **More Colors**, and enter **32** for Red, **94** for Green, and **200** for Blue to get the dark blue color seen in the Raritan logo; click **OK**.
8. For **Accent 1**, enter **112** for Red, **202** for Green, and **255** for Blue to get the light blue color; click **OK**.
9. For **Accent 3**, enter **218** for Red, **98** for Green, and **114** for Blue to get the burnt red color seen in the heart on the Raritan logo; click **OK**.

10. Review the settings:



- A Text/Background – Light 1 affects the font colors on the cover page and should be lavender.
- B Text/Background – Dark 2 affects the Title style and the box on the right side of the cover page and should be blue.
- C Accent 1 affects the Heading 1 style and the box on the left side of the cover page and should be light blue.
- D Accent 3 affects the horizontal lines above and below the Title style and should be a burnt red.

11. Enter **Raritan Color Set** in the Name box and click **Save** to close the Create New Theme Colors dialog box; then scroll through the cover page and page 1 to see the applied colors.

Create a Custom Font Set

12. Choose **Design**→**Document Formatting**→**Fonts** A menu button ▼→**Customize Fonts**.

13. Change the **Heading** font to **Cambria** and the **Body** font to **Times New Roman**.

The screenshot shows the 'Create New Theme Fonts' dialog box. It has a title bar with a question mark and a close button. Inside, there are two dropdown menus: 'Heading font:' set to 'Cambria' and 'Body font:' set to 'Times New Roman'. To the right of these is a 'Sample' box containing the text 'Heading' in a larger font and 'Body text body text body text. Body t' in a smaller font. Below the dropdowns is a text box labeled 'Name:' containing 'Raritan Font Set'. At the bottom right are 'Save' and 'Cancel' buttons.

14. Enter **Raritan Font Set** in the Name box, click **Save**, and then scroll through the document to see the applied fonts.

Note!

You can now see your custom color and font sets in their respective menus under the Design tab. These sets will appear as available choices for all documents from now on, just like the built-in color sets.

Create and Apply a Custom Theme

Now you will use these customizations to create a new theme, which you will then apply to another Raritan document.

15. Choose **Design**→**Document Formatting**→**Themes**  menu button ▼→**Save Current Theme**.
16. In the dialog box that appears, enter **Raritan Theme** as the File Name and click **Save**.
17. Save and close the file.
18. Open **W6-D2-RaritanNewsltr** from your **Word Chapter 6** folder and scroll through the document to see how it looks.
19. Choose **Design**→**Document Formatting**→**Themes**  menu button ▼→**Raritan Theme** and then scroll through the document to see the color and font changes.
20. Save the file as: **W6-D2-RaritanNewsltrRevised**

Working with Quick Parts and Building Blocks

Quick Parts are text and/or graphic elements you can use over and over again to save time. Like any other element in your document, Quick Parts adopt the themes you apply, including the color, font, and style sets. There are many different types of Quick Parts. Document Property Quick Parts and Auto Text Quick Parts are the most common; they are created by the user. Document Property Quick Parts allow you to input fields into your document that are filled in from a different source, similar to Mail Merge; however, unlike Mail Merge, this tool pulls information from the document properties you specify in the Backstage view. AutoText Quick Parts allow you to save pieces of text that you use repeatedly, so you don't have to type the same material multiple times.

Building Blocks is another term for Quick Parts, but it usually refers to Quick Parts that provide a traditional part of a newsletter or article, such as pull quotes and side bars. There are prebuilt Building Blocks available for your immediate use, but you can also create your own custom Building Blocks.

Note!

Quick Parts and Building Blocks that you customize and create are not document specific; they will be applied to your copy of Microsoft Word.



View the video “Inserting Quick Parts and Building Blocks.”

☰ Insert→Text→Explore Quick Parts

☰ Insert→Text→Explore Quick Parts →Building Blocks Organizer

DEVELOP YOUR SKILLS: W6-D3

In this exercise, you will insert Document Property fields into the Raritan Newsletter and fix a field that isn't working properly. Then, you'll insert a new sidebar for the second page. Finally, you'll create new AutoText Quick Parts from the company's master marketing document and insert one of these into the newsletter's new sidebar.

1. Save your file as: **W6-D3-RaritanNewsltrRevised**
2. Click the **File** tab to check the document properties and then click **Show All Properties** at the bottom right of the screen to see more fields.

Notice that the word Newsletter has been entered as the document's Title property.

3. Click **Back** to return to the document.

Insert Document Property Quick Parts

4. Place the insertion point in the blank line below the company logo and choose **Insert→Text→Explore Quick Parts** **menu button** ▼ → **Document Property→Title**.

Notice that the field was automatically populated with Newsletter, from the Title property box you saw in the Backstage view.

5. Place your insertion point at the end of the Subject line (after the colon), tap **Spacebar**, and choose **Insert→Text→Explore Quick Parts** **menu button** ▼ → **Document Property→Subject**.

This time just the field placeholder appears, meaning the Subject property is blank for this document. You'll fix that now.

6. Click the **File** tab and then click **Show All Properties**.
7. In the Subject box, enter: **Meningitis**

Status	Add text
Categories	Add a category
Subject	Meningitis
Hyperlink Base	Add text
Company	Raritan Clinic East

- Click **Back**  to return to the document.

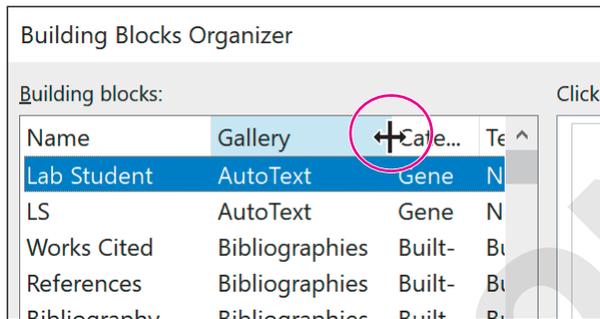
The Subject field has now been replaced with the word Meningitis.

- Place your insertion point at the end of the next line (after the colon), tap **Spacebar**, and choose **Insert**→**Text**→**Explore Quick Parts**  menu button ▼→**Document Property**→**Comments**.

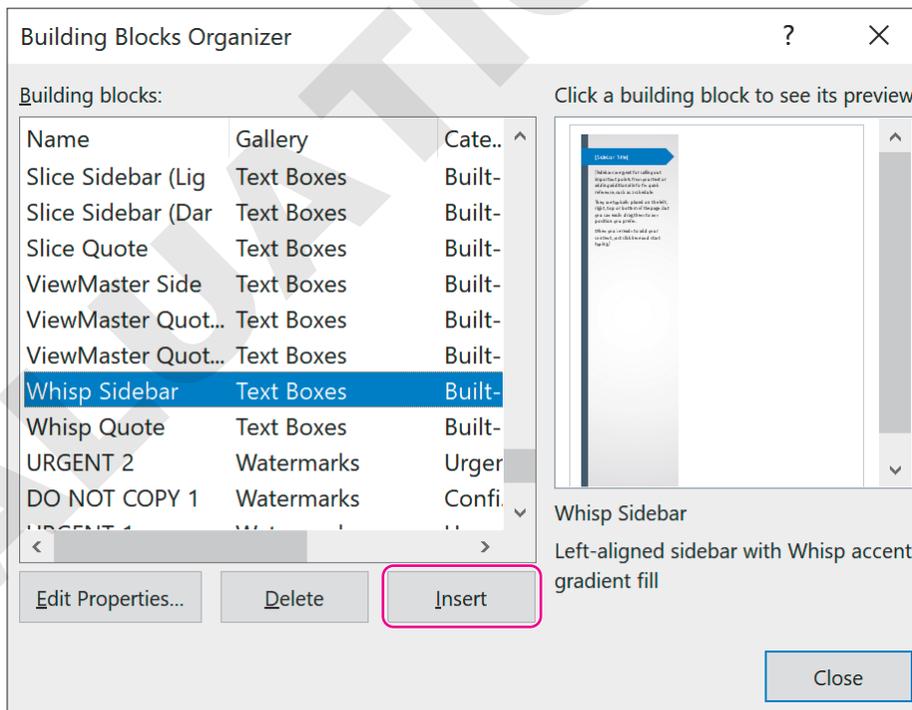
Insert Building Blocks

- Scroll to the second page and place the insertion point anywhere inside the text.
- Choose **Insert**→**Text**→**Explore Quick Parts**  menu button ▼→**Building Blocks Organizer**.

In the Building Blocks Organizer dialog box, the options are sorted by the second column: Gallery. You may need to expand the column sizes to see the entries in the Name and Gallery columns.



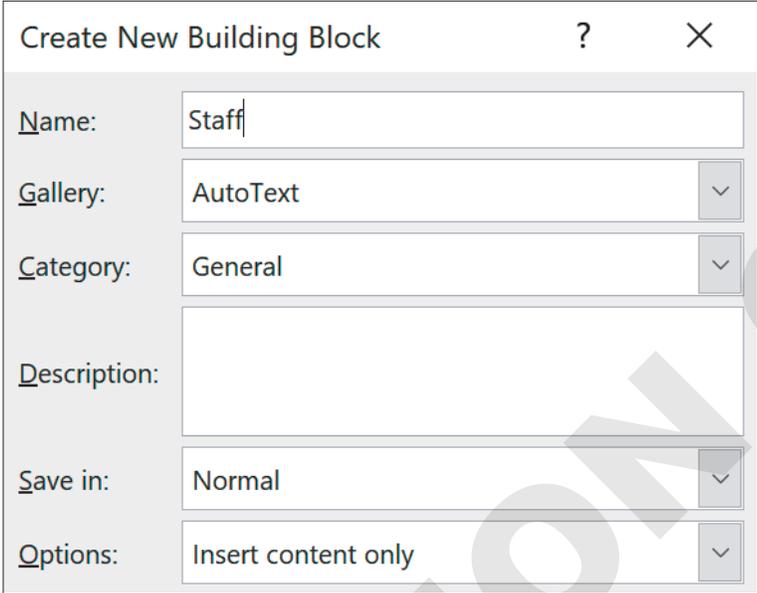
- Scroll down to the Text Boxes section, select **Whisp Sidebar**, and click **Insert**.



- Remove the **[Sidebar Title]** field and type **Location** in its place.

Create and Insert AutoText Quick Parts

14. Open **Raritan Marketing** from your **Word Chapter 6** folder.
15. Select both paragraphs under the **Staff** heading and choose **Insert**→**Text**→**Explore Quick Parts**  **menu button** ▼→**AutoText**→**Save Selection to AutoText Gallery**.
16. In the dialog box, enter **Staff** into the Name box, leave all other settings as they are, and click **OK**.



Create New Building Block ? X

Name: Staff

Gallery: AutoText ▼

Category: General ▼

Description:

Save in: Normal ▼

Options: Insert content only ▼

17. Select the paragraph under the **Location** heading and add it to the AutoText Gallery using the name: **Location**
18. Add the *Hours of Operation* and *Policy* paragraphs to the AutoText Gallery as well, and then close the Raritan Marketing file.
Now that these paragraphs have been added as AutoText Quick Parts, you can insert them over and over again, without needing to refer back to the original source document.
19. In the Newsletter, remove the Sidebar body placeholder text (beginning with [Sidebars are great...]) in the field below the Title and choose **Insert**→**Text**→**Explore Quick Parts**  **menu button** ▼→**AutoText**→**Location**.
20. Save the file.

Inserting Cover Pages

A cover page catches a reader's eye as the first dynamic part of your document. You can easily add professional polish to a document by using a built-in cover page. There are a number of predesigned (that is, built-in) cover pages to choose from. Cover pages automatically adopt the colors and fonts of your chosen theme, but if desired, you can modify the color and other design elements to achieve a cover page that best suits your needs.

 **Insert**→**Pages**→**Cover Page**  **menu button** ▼

DEVELOP YOUR SKILLS: W6-D4

In this exercise, you will add a cover page to your newsletter and remove some of the unnecessary Document Property Quick Parts fields automatically entered in the cover page.

1. Save your file as: **W6-D4-RaritanNewsltrRevised**
2. Choose **Insert**→**Pages**→**Cover Page**  **menu button** ▼, scroll through the gallery of available options, and choose **Banded**.

The title at the top of the page, as well as the author and company at the bottom of the page, were automatically inserted based on the document properties.

3. Scroll to the bottom of the cover page and click anywhere inside the **Author** field, which currently displays the text *Raritan Employee*.

Now that you've clicked inside the field, the bounding box appears, as well as a tab that shows the field name.

4. Click the **Author** tab to select the entire field and then tap **Delete**.



5. Use the same technique to delete the **Company Address** field.
6. Save the file.

Using Building Blocks Across Documents

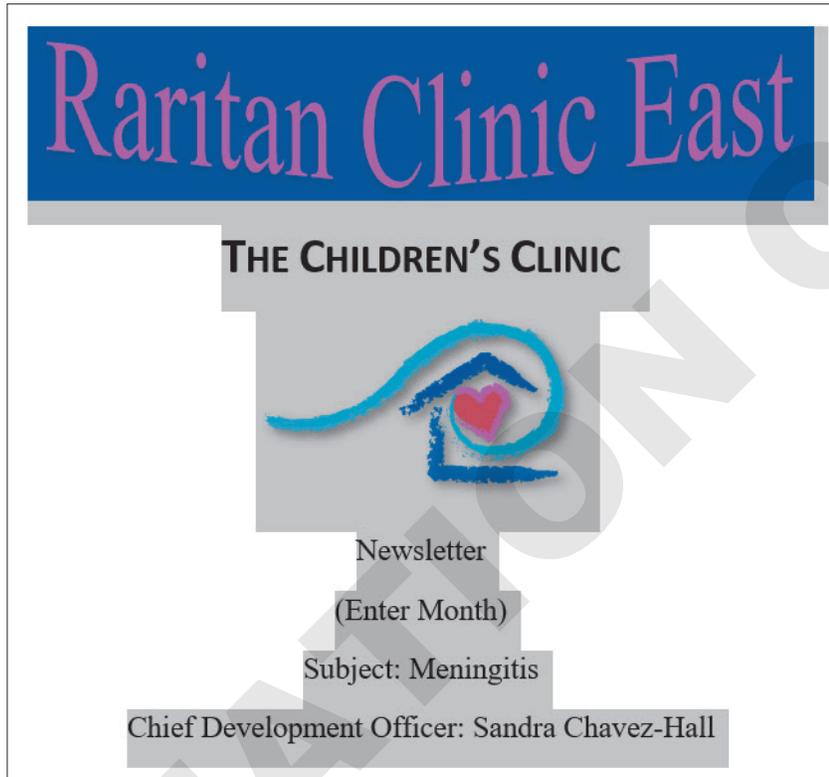
In addition to using the built-in Quick Parts and Building Blocks, you can also create your own by simply selecting the block you want to use and adding it to the Quick Part Gallery. Once you've created your custom building block, you can apply it to other documents as needed. Like their built-in counterparts, these custom building blocks will adapt the look of whatever theme has been applied to the target document.

 **Insert**→**Text**→**Explore Quick Parts**  →**Save Selection to Quick Part Gallery**

DEVELOP YOUR SKILLS: W6-D5

In this exercise, you'll add the first several lines of your newsletter to the Quick Part Gallery for use in later documents. You'll also add the company logo as a Quick Part.

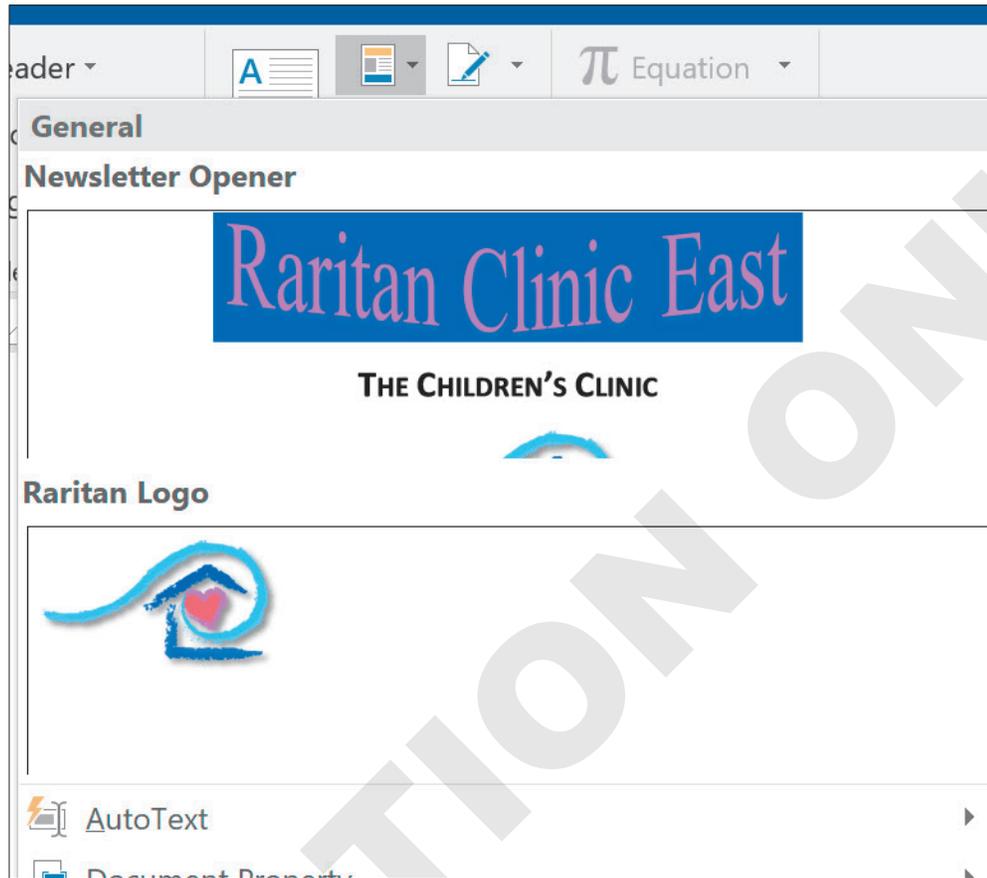
1. Scroll to the top of the first page in the main document. In the second line beneath the company logo, delete the word **November** and replace it with: **(Enter Month)**
2. Select the entire heading of the first page, from the WordArt down through the Chief Development Officer's name.



3. Choose **Insert**→**Text**→**Explore Quick Parts**  menu button ▼→**Save Selection to Quick Part Gallery**.
4. In the dialog box, enter **Newsletter Opener** in the Name box and click **OK**.
5. Click the Raritan Clinic East logo to select it and choose **Insert**→**Text**→**Explore Quick Parts**  menu button ▼→**Save Selection to Quick Part Gallery**.
6. Enter **Raritan Logo** as the Quick Part name and click **OK**.

7. Choose **Insert**→**Text**→**Explore Quick Parts**  **menu button** ▼ to see your custom Quick Parts.

These Quick Parts are now permanently available for your use.



8. Close the file; click **Don't Save** if Word prompts you.

Using Templates

All documents are based on a template that can include text, formatting, graphics, and other objects, as well as themes with custom color, font, and style sets. The default template is Blank document. The benefit of templates is that they do not change when documents *based on them* change. When you start a new document, you are opening a *copy* of the template. This lets you use templates repeatedly as the basis for new documents. Word provides a variety of ready-to-use templates, or you can create your own personal templates.

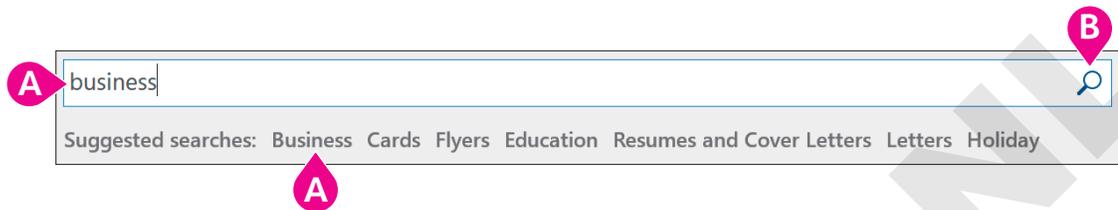
Templates are located in the Start screen or in Backstage view when you are starting a new file. Basing a new document on a template can save you a lot of time, as much of the work is already included.

 File→New

DEVELOP YOUR SKILLS: W6-D6

In this exercise, you will search for a newsletter template and use it as the basis for a new newsletter style that Raritan will adopt in the future. You will then apply your custom theme, ensuring that future Raritan newsletters have a consistent look and style.

1. Choose **File**→**New** and then follow these steps to locate a newsletter template:



- A Type **business** in the search field at the top of the screen. (If it appears in your Suggested Searches, click it to start the search instantly.)
- B If necessary, click the **Start Searching** button.

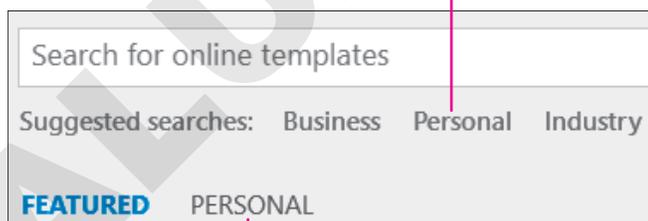
The options that appear for Suggested Searches may vary.

2. Scroll through the templates and double-click **Blue Curve Letterhead**.
3. To apply your customized theme choices to this prebuilt template, choose **Design**→**Document Formatting**→**Themes**  menu button ▼ →**Raritan Theme**.
4. Save the file as: **W6-D6-FutureNewsltr**

Saving Personal Templates

When you create a document containing specific formatting, text, themes, and graphics, you can save it as a template in the Custom Office Templates folder. When you save a personal template, the Personal category appears on the templates screen, with your templates inside.

This **Personal** category refers to Word-supplied templates such as personal letterhead.



This **PERSONAL** category refers to templates you create yourself.

DEVELOP YOUR SKILLS: W6-D7

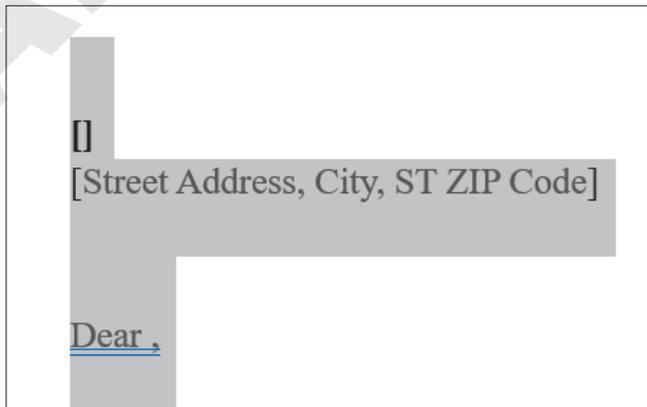
In this exercise, you will prepare the open document for use in future newsletters. You will remove several unnecessary fields, add document properties, and insert a few company-specific elements. When the document is ready, you'll save it as a template.

1. Click anywhere inside the **Company Name** field at the top of the document, click the Select Table's **move handle**  button, and tap **Backspace**.

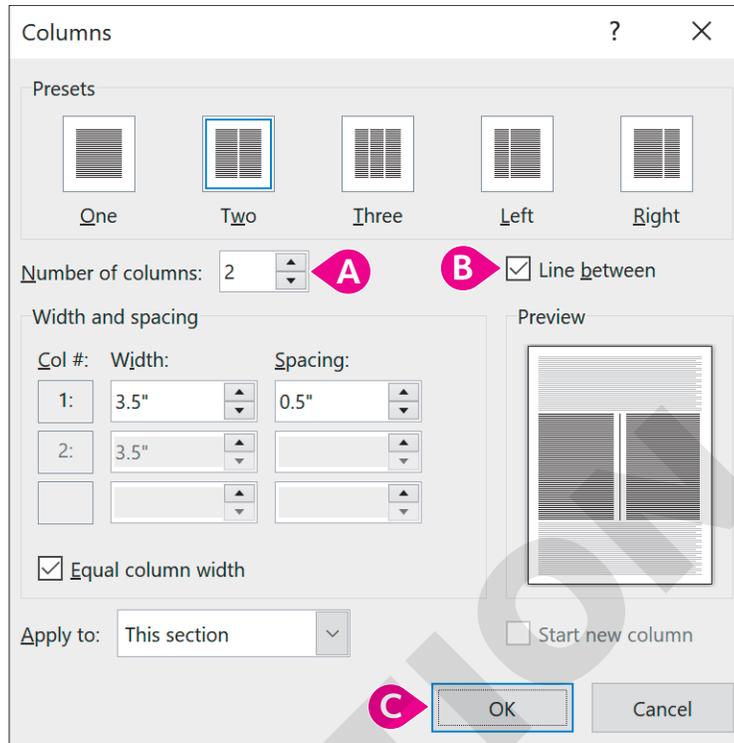


In some instances, the table may not be completely deleted. If the move handle button is still displayed, click it again and tap **Backspace** again to ensure the table is fully deleted.

2. Choose **Home**→**Paragraph**→**Center Alignment** .
3. Choose **Insert**→**Text**→**Explore Quick Parts**  menu button ▼→**Newsletter Opener**.
Your custom Quick Part has been inserted into the new template. The previous entries for the Title, Subject, and Comments have been replaced with fields, as you have not yet entered any properties into this document.
4. Click the **File** tab to enter the Backstage view and then click **Show All Properties**.
5. Enter **Newsletter** in the Title box and **Sandra Chavez-Hall** in the Comments box.
6. Click **Back**  to return to the document.
The Title and Comments fields have been replaced. The subject will change for each newsletter, so you've left that field to be filled in manually later.
7. If necessary, place the insertion point in the blank line below the Chief Development Officer line and then choose **Layout**→**Page Setup**→**Breaks**  menu button ▼→**Continuous** to insert a Continuous break above where the document will be split into two columns.
8. Delete the greeting line and the two lines above it.



9. Delete the three closing lines at the bottom of the page, labeled *Warm Regards, Name Here, and Your Title*.
10. Click anywhere inside the body text to select it and tap **Delete**.
11. Choose **Layout**→**Page Setup**→**Columns**  **menu button** ▼→**More Columns**.
12. In the Columns dialog box, change the settings as follows:



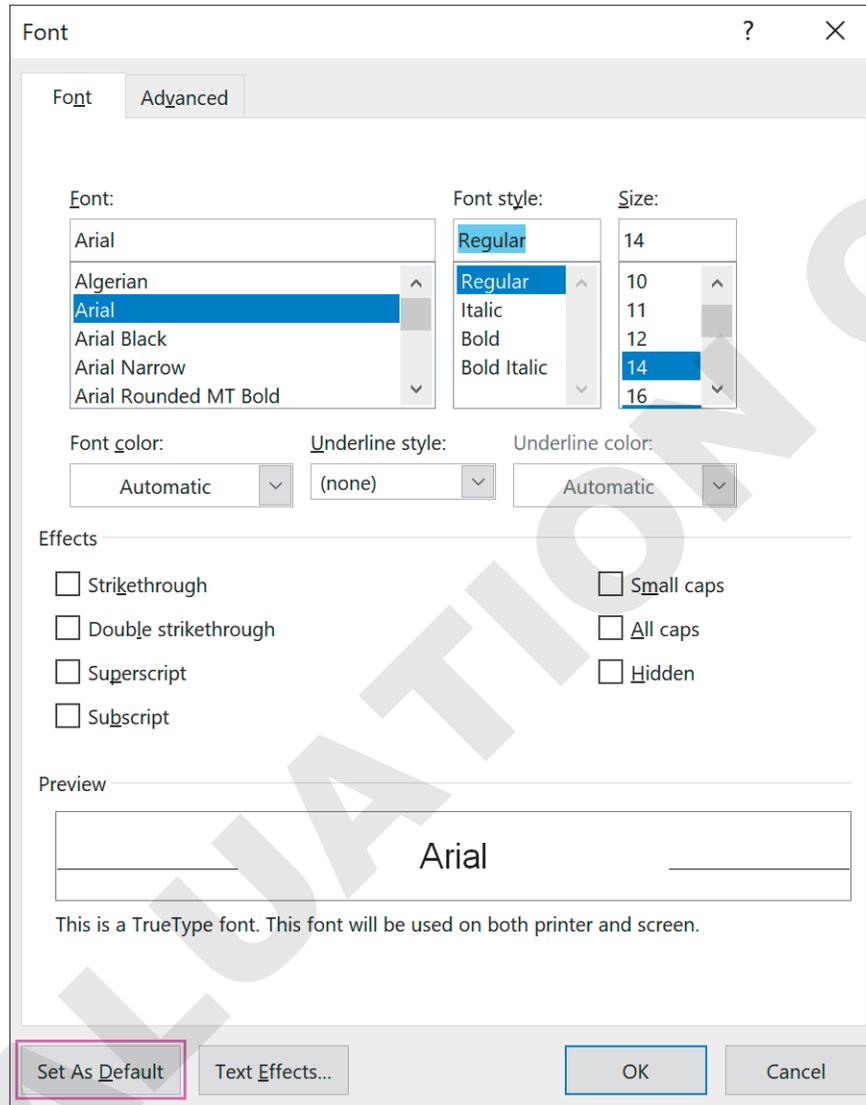
- A Change the number of columns to **2**.
- B Check the **Line Between** box.
- C Click **OK**.

The line between columns will not appear until enough text is entered to complete a column.

13. Save your file as: **W6-D7-FutureNewsltr**
Now that the template is ready to be reused for future Raritan newsletters, you'll save it as a template.
14. Choose **File**→**Save As**→**Browse** and change the Save as Type menu to **Word Template**.
15. Navigate to your **Word Chapter 6** folder, type **W6-D7-NewsltrTemplate** into the Name box, and click **Save**.
16. Close the file.
17. In Windows File Explorer, navigate to your **Word Chapter 6** folder and double-click the **W6-D7-NewsltrTemplate**.
A new document has been created from your template, with all your text theme choices and Quick Parts immediately included. The new document is ready for use as a newsletter.
18. Save the file to your **Word Chapter 6** folder as **W6-D7-DecemberNewsltr** and then close it.

Customizing the Default Font

The main default template in Microsoft Word is the Blank document template, which uses the Office theme, complete with the Office color and font sets. The default font for this theme, and therefore for Microsoft Word at large, is Calibri, 11-point size. This is often shown in available font lists as Body, a term referring to the built-in default text. If you prefer another font to be automatically selected whenever you create a new document with the Blank document template, you can change it in the Font dialog box using the Set As Default button.



Home→Font→dialog box launcher 

DEVELOP YOUR SKILLS: W6-D8

In this exercise, you will change the default Word font to Times New Roman, 12-point font, and open a new document to test the settings. Then, you'll change the default font back to its original settings.

1. Create a new document with the default **Blank document** template.
2. Choose **Home→Font→dialog box launcher** .

3. In the Font dialog box, change the font to **Times New Roman** and the size to **12**.

Font:	Font style:	Size:
Times New Roman	Regular	12
Times New Roman	Regular	10
Trebuchet MS	Italic	11
Tw Cen MT	Bold	12
Tw Cen MT Condensed	Bold Italic	14
Tw Cen MT Condensed Extra Bold		16

Now that you've changed the font settings, you can make these changes the new default.

4. Click the **Set as Default** button.
5. In the window that appears, select **All documents based on the Normal template?** and click **OK**.

Microsoft Word		?	×
Do you want to set the default font to Times New Roman, 12 pt for:			
<input type="radio"/>	This document only?		
<input checked="" type="radio"/>	All documents based on the Normal template?		
<input type="button" value="OK"/>		<input type="button" value="Cancel"/>	

Your changes have now become the new default font. Let's test it.

6. Close the file without saving and open a new file based on the **Blank document** template.
The Font box now shows Times New Roman, and the Size box shows 12.
7. Type a few words to see the new default.
8. Choose **Home**→**Font**→**dialog box launcher** , change the Font to **+Body** at the top of the font list, and change the size to **11**.
9. Click **Set as Default**, choose **All documents based on the Normal template?**, and click **OK**.
10. Close the file, choosing not to save if prompted.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W6-R1

Create a Consistent Newsletter Theme

Leaders at Kids for Change want to create consistency across all publications the organization creates. In this exercise, you will modify an existing newsletter's theme and save it for future use. Then, you'll save the file as a template.

1. Open **W6-R1-SchoolHabitat** from your **Word Chapter 6** folder.
2. Choose **Design**→**Document Formatting**→**Themes menu button** ▼ and choose **Organic** from the Themes gallery.
3. Choose **Design**→**Document Formatting**→**Colors menu button** ▼ and select **Blue** from the Colors gallery.
4. Choose **Design**→**Document Formatting**→**Fonts menu button** ▼, scroll down if necessary, and select **Georgia** from the Font gallery.
5. Choose **Design**→**Document Formatting** and then click **More**  to open the Style Sets gallery.
6. Choose **Basic (Elegant)**, the first option in the first row under Built-In. Scroll through the document to see the changes you've made.



Customize and Save the Theme

7. Choose **Design**→**Document Formatting**→**Colors menu button** ▼→**Customize Colors**.
8. In the Create New Theme Colors dialog box, select the **Text/Background - Dark 1** menu button ▼ and choose **More Colors**.
9. In the Colors box, choose the **Custom** tab, if necessary, and enter **5** for Red, **104** for Green, and **57** for Blue; click **OK**.
10. Select the **Accent 1** menu button ▼ and choose **Blue, Accent 1, Lighter 60%** in the fifth column, third row, under Theme Colors.
11. Enter **Kids for Change Color Set** in the **Name** box and click **OK**.
12. Choose **Design**→**Document Formatting**→**Fonts menu button** ▼→**Customize Fonts**.
13. Change the **Heading** font to **Cambria**; leave the Body font as Georgia.
14. Enter **Kids for Change Font Set** in the **Name** box and click **Save**.
15. Choose **Design**→**Document Formatting**→**Themes menu button** ▼→**Save Current Theme**.
16. In the dialog box, enter **Kids for Change Theme** as the filename and then click **Save**.

Save a Personal Template

17. Scroll to the top of the cover page and delete the word **March** below the *Newsletter* heading.
18. Scroll to the top of the main document and replace the WordArt text, currently showing *Schoolyard Habitat*, with the word: **Title**
19. Select all the text in the two columns and tap **Delete**. Leave the butterfly image as a placeholder for future images.
20. Choose **File**→**Save As**→**Browse** and change the Save as Type menu to **Word Template**.
21. Save the file to your **Word Chapter 6** folder as: **W6-R1-KidsforChangeTemplate**
22. Close the file.

REINFORCE YOUR SKILLS: W6-R2

Add Pizazz to a Wetlands Protection Newsletter

Kids for Change is starting a wetlands protection project. It's issuing a press release discussing the importance of wetlands and asking for volunteers to become part of the project. In this exercise, you will add a cover page, create a custom Quick Part, and place a Building Block at the end of the document.

1. Open **W6-R2-Wetlands** from your **Word Chapter 6** folder and save it as: **W6-R2-WetlandsRevised**
2. Choose **Insert**→**Pages**→**Cover Page menu button** ▼ and select the **Ion (Light)** option.
3. Click anywhere inside the Year field at the top right of the screen, click the **Year** tab that appears above and then tap **Delete**.
4. Repeat this process to delete the **Author Name** field beneath the title and subtitle.
5. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Document Property**→**Comments**.
Now that you've entered the field, you'll need to fill in the document property so your name appears.
6. Click the **File** tab to enter the Backstage view and then type your name into the Comments box.
7. Click **Back** to return to the document.

Use a Custom Quick Part

8. Open **Kids for Change header** from your **Word Chapter 6** folder.
9. Press **Ctrl**+**A** to select the entire document.
10. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Save Selection to Quick Part Gallery**.
11. In the dialog box, enter **Kids for Change opener** in the Name box and click **OK**.
12. Close the file to return to the newsletter.
13. Scroll to the bottom of the newsletter and place the insertion point in the blank line below the last paragraph in the second column.
14. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼ and choose the **Kids for Change opener** you created.

Add a Closing Building Block

15. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Building Blocks Organizer**.
16. In the dialog box, scroll down to the Text Boxes section, select **Filigree Sidebar**, and click **Insert**.
17. Click anywhere inside the **Sidebar Title** field and tap **Delete**.
18. Type **Volunteer for this project!** as the new title.
Note that the new title is capitalized automatically.
19. Click anywhere inside the text below the Quick Part title, tap **Delete**, and type: **Reach out to us on Facebook to volunteer for this or other Kids for Change projects!**
20. Save and close your document.

REINFORCE YOUR SKILLS: W6-R3

Create a Newsletter to Fight Water Pollution

Kids for Change is starting a Protect Our Waterways project to fight water pollution. The supervisor for the project is using a newsletter as a means of getting the word out. In this exercise, you will set up the newsletter with a theme, cover page, custom Quick Part, and Building Block.

1. Open **W6-R3-WaterPollution** from your **Word Chapter 6** folder and save it as: **W6-R3-WaterPollutionRevised**
2. Choose **Design**→**Document Formatting**→**Themes menu button** ▼ and then choose **Basis** from the Themes gallery.
3. Choose **Design**→**Document Formatting**→**Colors menu button** ▼ and then select **Blue II** from the Colors gallery.

Add a Custom Quick Part to a Cover Page

4. Open the **Kids for Change contact** file from your **Word Chapter 6** folder.
5. Press **Ctrl**+**A** to select the entire document.
6. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Save Selection to Quick Part Gallery**.
7. In the dialog box that appears, enter **Kids for Change contact** in the Name box and click **OK**.
8. Close the file to return to the newsletter.
9. Choose **Insert**→**Pages**→**Cover Page menu button** ▼ and select the **Grid** option.
10. Click anywhere inside the **Abstract** field just below the title on the cover page, click the **Abstract** tab that appears above, and tap **Delete**.
11. Repeat the process to delete the **Document subtitle** field on the right side of the page.
12. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼ and choose the **Kids for Change contact** you created.

Add a Centered Building Block

13. Scroll down to the main document and place the insertion point anywhere inside the two-column text.
14. Choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Building Blocks Organizer**.
15. In the dialog box, scroll down to the Text Boxes section, select **Simple Quote**, and then click **Insert**.
16. Tap to remove the placeholder text and type: **Kids Empowering Communities**
17. Save and close the file.

EVALUATION ONLY

Apply Your Skills

APPLY YOUR SKILLS: W6-A1

Create a Travel Newsletter Theme

Universal Corporate Events keeps its clients informed about the latest travel industry news by publishing a monthly newsletter. In this exercise, you will modify an existing newsletter's theme and save the file as a template to be used in future publications.

1. Open **W6-A1-CorpTravel** from your **Word Chapter 6** folder.
2. Apply the **Organic** theme.
3. Apply the **Blue Warm** color set.
4. Apply the **Corbel** font set.
5. Apply the **Lines (Simple)** style set.
6. Change the **Text/Background - Dark 1** color to an orange custom color, with **249** for Red, **166** for Green, and **26** for Blue.
7. Change Accent 2 to **Blue-Gray, Accent 1**.
8. Name the color set: **Universal Events Color Set**
9. Change the Body font to **Calibri**; leave the Heading font as Corbel.
10. Name the font set: **Universal Events Font Set**
11. Save the current theme as: **Universal Events Theme**

Save a Personal Template

12. Scroll to the top of the cover page and delete the word **July** below the *Newsletter* heading.
13. Delete the paragraph under the *Abstract* heading on the right side of the cover page. Replace it with: **Enter Summary Here**
14. Leaving the graphic as a placeholder, select all of the text in both columns, from the *Four Hidden Benefits...* header through the end of the second page, and tap **[Backspace]**.
15. Save the file as a template to your **Word Chapter 6** folder, giving it the name: **W6-A1-UniversalEventsTemplate**
16. Save and close the file.

APPLY YOUR SKILLS: W6-A2

Add Zest to a Bleisure Newsletter

This month's Universal Corporate Events newsletter focuses on the latest "bleisure" (a blend of business and leisure) travel trend. In this exercise, you will add a cover page, custom Quick Part, and Building Block to the newsletter, which is designed to keep clients' travel agents updated with the latest developments in the travel industry.

1. Open **W6-A2-BleisureTravel** from your **Word Chapter 6** folder and save it as: **W6-A2-BleisureTravelRevised**
2. Insert the **Motion** cover page from the cover page gallery.

3. Delete the **Year** field at the top of the page and the **Author** and **Date** fields at the bottom of the page.
4. Change the file's Company property to: **Universal Corporate Events**
5. Scroll down to the main document and place the insertion point after the colon at the end of the Company line.
6. Tap and choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Document Property**→**Company**.
7. Place the insertion point after the colon at the end of the Contact line, tap , and choose **Insert**→**Text**→**Explore Quick Parts menu button** ▼→**Document Property**→**Comments**.

Add a Custom Quick Part to a Building Block

8. Place the insertion point anywhere inside the body text in the left column of the main document.
9. Use the Building Blocks Organizer dialog box to insert a **Banded Sidebar** from the Text Boxes section.
10. Replace the Title placeholder at the top of the sidebar with: **Bleisure Stats**
11. Open **Bleisure Survey Statistics** from your **Word Chapter 6** folder.
12. Select the entire document and use the selection to create a custom Quick Part with the name **Statistics**; close the file.
13. Click anywhere inside the sidebar body text placeholder and tap to remove it.
14. Insert the **Statistics** custom Quick Part as the new sidebar body text.
15. Save and close your document.

APPLY YOUR SKILLS: W6-A3

Create a Travel Tips Newsletter

Universal Corporate Events shares travel tips with its clients' travel agents in this month's newsletter. In this exercise, you will set up the travel tips newsletter to incorporate a theme, cover page, custom Quick Part, and Building Block.

1. Open **W6-A3-TravelTips** from your **Word Chapter 6** folder and save it as: **W6-A3-TravelTipsRevised**
2. Apply the **Integral** theme.
3. Apply the **Blue Green** color set.
4. Open the **Universal Corp contact** file from your **Word Chapter 6** folder.
5. Select the entire document; add it as a custom Quick Part with the name **UCE contact** and then close the file.
6. Insert a **Grid** cover page from the cover page gallery.
7. Delete the **Abstract** and **Subtitle** fields from the cover page.
8. Place the **UCE contact** custom Quick Part inside the darker box on the right side of the page.
9. Scroll down to the main document and place the insertion point anywhere inside the two-column text.

10. Using the Building Blocks Organizer dialog box, insert the **Simple Quote** Quick Part from the Text Boxes gallery section.
11. Remove the placeholder text and type **Use Yelp for the best source of local cuisine** into the Simple Quote Quick Part box.
12. Save and close the file.



Project Grader

This chapter does not include Project Grader exercises. Project Grader content is based on the learning objectives for a chapter, and sometimes those learning objectives cannot be accurately graded by the system. Objectives from this chapter that can be accurately graded may be included in later chapters, if applicable.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W6-E1 That's the Way I See It

As a small-business owner, you want to keep your customers interested in what you're doing, so you decide to send out monthly newsletters. Determine the type of business you own and then draft the beginnings of a newsletter, with a title placeholder and a placeholder paragraph split into two columns. Insert a cover page and remove any fields you don't want to use, leaving at least one. Create a custom theme consisting of a custom color and font set. Save the color set, font set, and theme with unique names related to your business. Save your newsletter as a template with the name: **W6-E1-MyBiz**

W6-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you decide to keep in touch with customers by distributing a newsletter. Start a new document and save it as: **W6-E2-Landscape**

Draft a newsletter with a title, two blank lines below the title, and a few paragraphs of body text split into two columns. Insert a cover page of your choice and delete any fields you don't want to use. Use the Backstage view to change the document properties for the fields you keep. In the two blank lines below the title, place two more document property fields and change those document properties in the Backstage view. Using another blank document, insert a shape or graphic and then insert two lines of contact information. Save what you've created as a custom Quick Part and insert it into your main document. Insert and fill in another Building Block of your choice.

W6-E3 Demonstrate Proficiency

Stormy BBQ keeps its customers engaged through a monthly newsletter. This month's newsletter will describe the benefits of local farm-raised pork and beef. Conduct online research to gather the primary content for your newsletter, ensuring you cite your sources. Create a newsletter with a title and a few paragraphs of body text split into two columns. Insert a cover page of your choice, removing or replacing fields as you choose. Apply a custom theme with a unique name. Use another blank document to create a short custom Quick Part and place it inside your main document. Add a Building Block of your choice from the Building Blocks Organizer dialog box. Save your file as:

W6-E3-FarmRaised

WORD

7

Working with Long Documents



Long documents are important in both academia and business. They range in type from dissertations to research reports. In this chapter, you will use styles to provide consistent heading formatting, which leads the reader's eye through the document. You will customize styles and other features to suit your needs, and you will use several techniques to quickly navigate long documents. Finally, you will work with long tables to make them easy to read and to find information.

LEARNING OBJECTIVES

- ▶ Format with styles
- ▶ Create and manage custom styles
- ▶ Customize bullets and numbering
- ▶ Navigate long documents
- ▶ Format long tables
- ▶ Add captions

Project: Reporting on Common Childhood Illnesses

Raritan Clinic East periodically hosts seminars for parents of young children to discuss common childhood illnesses. As a certified nursing assistant, you have been asked to research these illnesses and compile a report that the clinic will use as a handout for the seminars. You will use styles and other formatting features to make your report engaging to the reader. Then you will create a table to keep track of the attendees.

Formatting Text with Styles

A style is a collection of formats that you can apply to text. When you type a document, you are automatically using a style. This is typically the Normal style, which includes Calibri font, 11 pt, left-justified, and so forth. Or you might be using a custom template that is set up with a different default style. Styles are based on the current template's theme. Styles help you provide consistent formatting throughout a document.

The Styles gallery on the Ribbon is limited to frequently used styles. For a more in-depth approach and access to more styles, you must open the Styles task pane.



View the video “The Styles Gallery and the Styles Task Pane.”

 Home → Styles dialog box launcher 

Custom Styles

Thus far, you've used Word's built-in styles. However, there may be situations in which the built-in styles don't meet your needs; for example, Raritan Clinic East has formatting standards set for different types of documents, and you can create custom styles to meet those standards. When creating these custom styles, you can also define the *level* in which you want them to be listed, which will determine how these headings are placed in a table of contents or your document's Headings list.

There are two approaches to creating custom styles. The method you choose is a matter of personal preference; both are equally effective and are described below:

- ▶ **Style by definition:** Choose all formats from the Create New Style from Formatting dialog box.
- ▶ **Style by example:** Format a block of text with the formats you wish to include in your style. The Create New Style from Formatting dialog box can copy the formats from your formatted text.



View the video “Create a Style by Definition and a Style by Example.”

DEVELOP YOUR SKILLS: W7-D1

In this exercise, you will create custom styles. You'll begin by opening the Styles task pane and creating a new style by example for the document heading. Then you will create a style by definition.

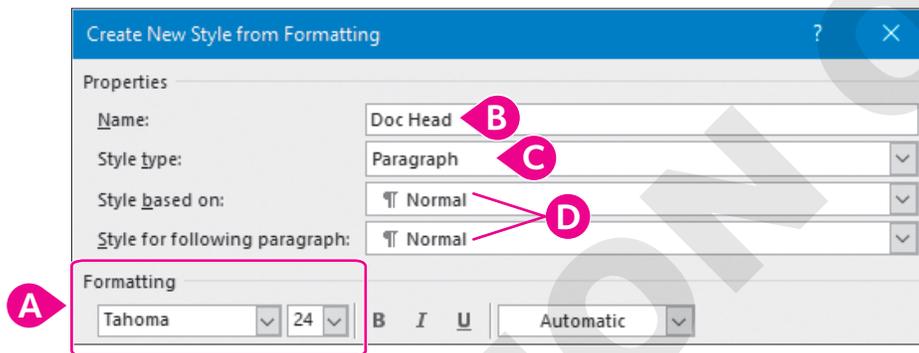
1. Open **W7-D1-SickKids** from your **Word Chapter 7** folder and save it as:
W7-D1-SickKidsRevised
2. Select the **Raritan Clinic East** heading at the top of the document.

Now you will apply the example formatting.

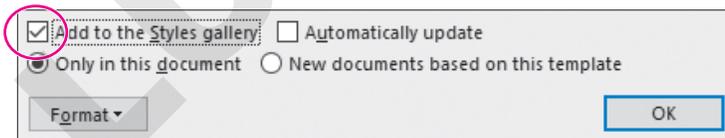
3. Choose **Home**→**Font**→**Font menu button** ▼ and then choose **Tahoma** from the menu.
4. Click the **Font Size menu button** ▼ and choose **24 pt.**
5. Choose **Home**→**Paragraph**→**Center** .
6. Choose **Home**→**Styles dialog box launcher**  to display the Styles task pane.
7. At the bottom of the task pane, click the **New Style**  button to open the Create New Style from Formatting dialog box.



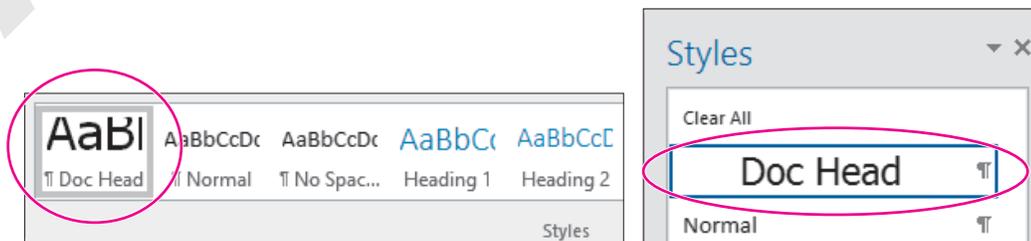
8. Follow these steps to complete the new style:



- A The example formatting you applied earlier shows here.
 - B Name the style: **Doc Head**
 - C Make sure the Style type is **Paragraph**.
 - D If necessary, set the new style to be based on the **Normal** style and set the formatting for the following paragraph to **Normal**.
9. At the bottom of the dialog box, make sure the **Add to the Styles gallery** box is checked and then click **OK**.



When the text that has the style applied is selected or the insertion point is in the text, your new style is highlighted in the Styles gallery on the Ribbon and in the Styles task pane.



Create Styles by Definition

Now you'll create a style by definition for the subheading at the top of the document.

10. Click in the **Childhood Diseases Seminar** subheading.
11. Click the **New Style**  button at the bottom of the Styles task pane.
12. Set up the top portion of the dialog box as shown:

Properties	
<u>N</u> ame:	Subhead 1
Style <u>t</u> ype:	Paragraph
Style <u>b</u> ased on:	Normal
<u>S</u> tyl <u>e</u> for following paragraph:	Normal

You could do some font formatting in this dialog box, but you will choose the **Format** button instead because it provides more font options.

13. Click the **Format** button at the bottom of the dialog box, choose **Font** to open the Font dialog box, and choose **Tahoma** from the Font list.

Tip!

If you type a t in the field at the top of the font list, the list automatically scrolls to the Ts.

14. Choose **14 pt** as the font size, check the **Small Caps** checkbox, and click **OK**.

Your font choices appear in the dialog box, and the preview screen displays the effect of your choices. Next, you will change the level of this subhead.

15. Click the **Format** button and choose **Paragraph**.
16. Click the **Outline Level menu button**  and choose **Level 1**.

Paragraph		?	×
<u>I</u> ndents and Spacing	<u>L</u> ine and <u>P</u> age Breaks		
General			
Alignment:	Left	▼	
<u>O</u> utline level:	Level 1	▼	<input type="checkbox"/> Collapsed by default

Notice that there are nine possible levels. Level 1 will be farthest left, Level 2 will be indented, Level 3 will be further indented, and so on.

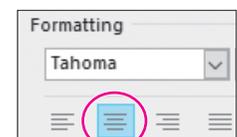
17. Click **OK**.

Next you will center the subheading.

18. Click the **Center** button in the paragraph alignment group and click **OK**.

The new style appears in the Styles gallery on the Ribbon and in the Styles task pane.

Now you will create styles for the subheadings in the body of the document. You will have two levels of subheadings, and you will create styles by example for these subheadings.



19. In the next line, select **WebMD** and format it with **Arial, 14 pt**.
20. Click the **New Style**  button and follow these guidelines to finish creating the style:
 - Name: **Subhead 2**
 - Style Type: **Paragraph**
 - Style Based On: **Normal**
 - Style for Following Paragraph: **Normal**
21. Notice the example font formatting you applied in the Formatting area of the dialog box and then click **OK**.
You will apply the Subhead 2 style to another subheading in the document.
22. Scroll to page 3, position the insertion point in the subheading **Parents.com**, and choose **Subhead 2** from the Styles gallery.
23. Scroll back up to page 1, position the insertion point in the **RSV** subheading, and choose **Home**→**Font**→**Font menu button** ▼.
24. Choose the **Arial** font and the **12 pt** font size.
25. Click the **New Style**  button and follow these guidelines to finish creating the style:
 - Name: **Subhead 3**
 - Style Type: **Paragraph**
 - Style Based On: **Normal**
 - Style for Following Paragraph: **Normal**
26. Notice the example settings in the Formatting area and then click **OK**.
Now you will apply Subhead 3 to the rest of the subheadings in the document.
27. Click in the **Ear Infection** subheading and choose **Subhead 3** from the Styles task pane.
28. Use the same technique to apply Subhead 3 to the remaining subheadings:

<ul style="list-style-type: none"> • Glue Ear • Croup • Hand-Foot-and-Mouth Disease • Pinkeye • Fifth Disease 	<ul style="list-style-type: none"> • Common Cold • Strep Throat • Influenza • Symptoms You Should Never Ignore
---	--
29. Save the file.

Modifying Styles and Clearing All Formatting

You can modify a built-in style as well as styles that you create. Modifying styles can help you maintain consistency when you make formatting changes and can speed up that process. You can make global formatting changes by modifying a style. When you change a style, the change is applied to all the text in the current document that is formatted with the style. This eliminates the need to modify each text block individually—a big time saver.

Sometimes it is easier to reformat text from the beginning instead of trying to figure out which formats were used. This can be particularly helpful if you've inherited a heavily formatted document. The Clear All Formatting command in the Styles task pane is a quick way to remove styles and all other unwanted formatting from a document or a selected block of text.

 Home→Font→Clear All Formatting 

Using Styles Across Documents

By default, custom styles you create are available only for the document in which you created them. However, you may want your custom styles to be available in other documents as well. You can do this by specifying that you want the style to be available in all *New documents based on this template*. Doing this in a document created from the default Blank document template will make the style available in all new blank documents you create from that point on.

Warning!

Adding styles to the template this way is a permanent change. The only way to remove these custom styles from the template is through the Organizer on the Developer tab (activated through the Customize Ribbon tab on the Options screen) under Document Template.

DEVELOP YOUR SKILLS: W7-D2

In this exercise, you will modify the Subhead 3 style. When you do, you will see how it impacts all text formatted with that style. Then you will use the Clear All Formatting feature to remove formatting from a heading.

1. Save your file as: **W7-D2-SickKidsRevised**
2. Hover the mouse pointer over *Subhead 3* in the Styles task pane and click the **menu** button ▼ that appears.
3. Choose **Modify** from the menu to open the Modify Style dialog box.

This dialog box contains the same elements as the Create New Style from Formatting dialog box.

4. Click **Italic**  and then click **OK**.
5. Scroll through the document and see that all subheadings with the Subhead 3 style are now italicized.

You've decided to reformat the heading at the top of the document. Because this style is used only once in the document, it's easier to clear all the formatting and apply direct formatting to the heading.

6. Select the **Raritan Clinic East** heading at the top of the document, scroll to the top of the Styles task pane, and choose **Clear All**.
7. Click the **Home**→**Font dialog box launcher**  and choose **Tahoma, 22 pt, Small Caps**; click **OK**.
8. Choose **Home**→**Paragraph**→**Center** .

The Normal style is highlighted in the task pane. You applied direct formatting to text that is formatted with the Normal style.

9. Save the file.

Removing and Deleting Styles

You can remove a style from the Styles gallery on the Ribbon without removing it from the Styles task pane. Because the Styles gallery on the Ribbon is a quick way to get to styles, you should save it for just the styles you use frequently. You can leave the style in the task pane for future use, or, if you prefer, you can delete it from the task pane. Completely deleting a style removes its formatting from the document.

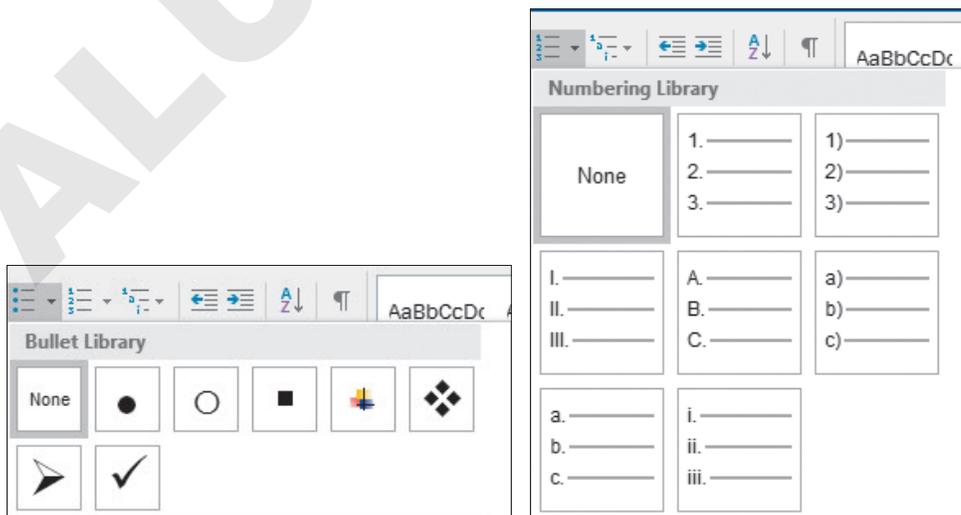
DEVELOP YOUR SKILLS: W7-D3

In this exercise, you will remove the Doc Head style from the Styles gallery and then delete it from the task pane.

1. Save your file as: **W7-D3-SickKidsRevised**
2. If the Doc Head style is not visible in the Styles gallery on the Ribbon, click **More**  to open the gallery and then locate the Doc Head style.
3. Right-click the style name and choose **Remove from Style Gallery**.
Doc Head is still visible in the Styles task pane. You'll delete it next.
4. Hover the mouse pointer over *Doc Head* in the Styles task pane, click the **menu** button  that appears, and choose **Delete Doc Head**.
5. When the message appears verifying the deletion, click **Yes**.
The style is deleted from the task pane.
6. Save and close the file.

Customizing Bullet and Number Formats

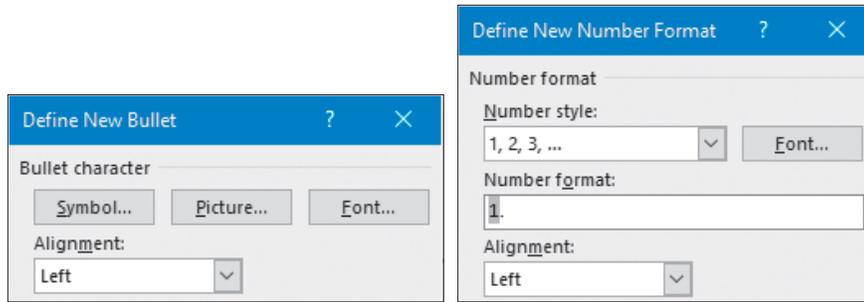
The Bullets and Numbering libraries enable you to choose a different style for your bulleted or numbered list. You can also define your own custom formats. When working with long documents, you may want to adjust the formatting for certain lists as a visual cue that certain lists go together or should be considered separately.



Bullet Library

Numbering Library

You can customize bullet styles by defining a symbol, picture, font, or alignment. You can customize numbering by defining style, font, format, and alignment.



Customize Bullet Format

Customize Number Format

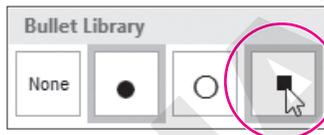
☰ Home→Paragraph→Bullets

☰ Home→Paragraph→Numbering

DEVELOP YOUR SKILLS: W7-D4

In this exercise, you will choose a different bullet style from the Bullet Library. Then you will create a custom bullet using a symbol as the new bullet style.

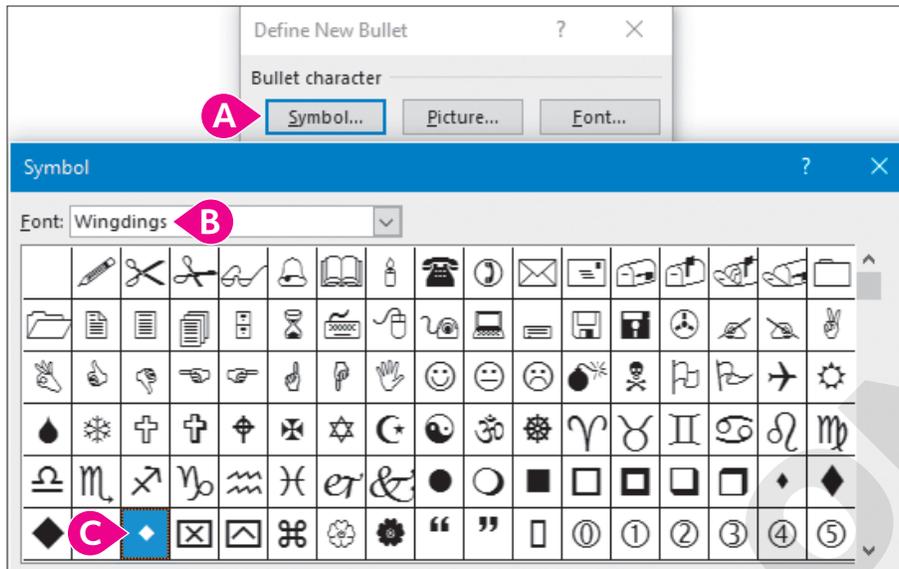
1. Open **W7-D4-SickKids** from your **Word Chapter 7** folder and save it as: **W7-D4-SickKidsRevised**
2. Scroll to page 4 and position the insertion point in the **Symptom #1** line.
3. Choose **Home→Paragraph→Bullets** ☰ menu button ▼ and choose the square bullet (location may vary).



All the bullets in the list are updated. Next you will create a custom bullet.

4. Choose **Home→Paragraph→Bullets** ☰ menu button ▼ and choose **Define New Bullet**.

- Follow these steps to define a symbol as a new bullet:



- Click the **Symbol** button to open the Symbol dialog box.
- If necessary, choose the **Wingdings** font.
- Make sure the scroll box is at the top of the scroll bar, choose this symbol (location may vary), and click **OK** twice.

Again, all of the bullets have changed to the custom bullet.

- Choose **Home**→**Paragraph**→**Bullets**  **menu button** ▼.

The new bullet was added to the library. Now you'll remove the bullet so the next student who uses your computer will have the same experience.

- Right-click the new bullet in the Bullet Library area and choose **Remove**.
- Display the Bullet Library again and notice the new bullet is removed from the Bullet Library area but remains under Recently Used Bullets; close the menu.
- Save your file.

Using Special Characters

Special characters appear in the Symbol dialog box. There are a variety of special characters, including **nonbreaking hyphens or spaces**. Nonbreaking characters allow you to keep terms together that should remain together on one line, such as dates, phone numbers, and names.

 **Insert**→**Symbols**→**Symbol** →**Special Characters**

DEVELOP YOUR SKILLS: W7-D5

In this exercise, you will insert nonbreaking spaces in doctors' names that appear in the document. This will correct doctors' names that split across two lines, and it's also a safety measure in the event that future edits would cause the name to split across two lines.

1. Save your file as: **W7-D5-SickKidsRevised**
2. Scroll to page 3, locate the fifth line in the *Common Cold* paragraph, and position the insertion point after *Fred*.

might lead to an overdose," says pediatrician Fred Hirschenfang, M.D.,

3. Tap **Delete** to remove the space.
4. Choose **Insert**→**Symbols**→**Symbol**  and then choose **More Symbols** from the menu.
5. Click the **Special Characters** tab in the Symbol dialog box and choose **Nonbreaking Space**.
6. Click the **Insert** button at the bottom of the dialog box and then click **Close**.
7. If necessary, display the formatting marks to see the character that represents a nonbreaking space.
8. Position the insertion point after the comma following the last name and **Delete** the space.
9. Choose **Insert**→**Symbols**→**Symbol** →**More Symbols**, click the **Special Characters** tab, and choose **Nonbreaking Space**.

Notice the shortcut keystrokes for a nonbreaking space: **Ctrl** + **Shift** + **Space**. You can use the keystrokes for the remaining two names.

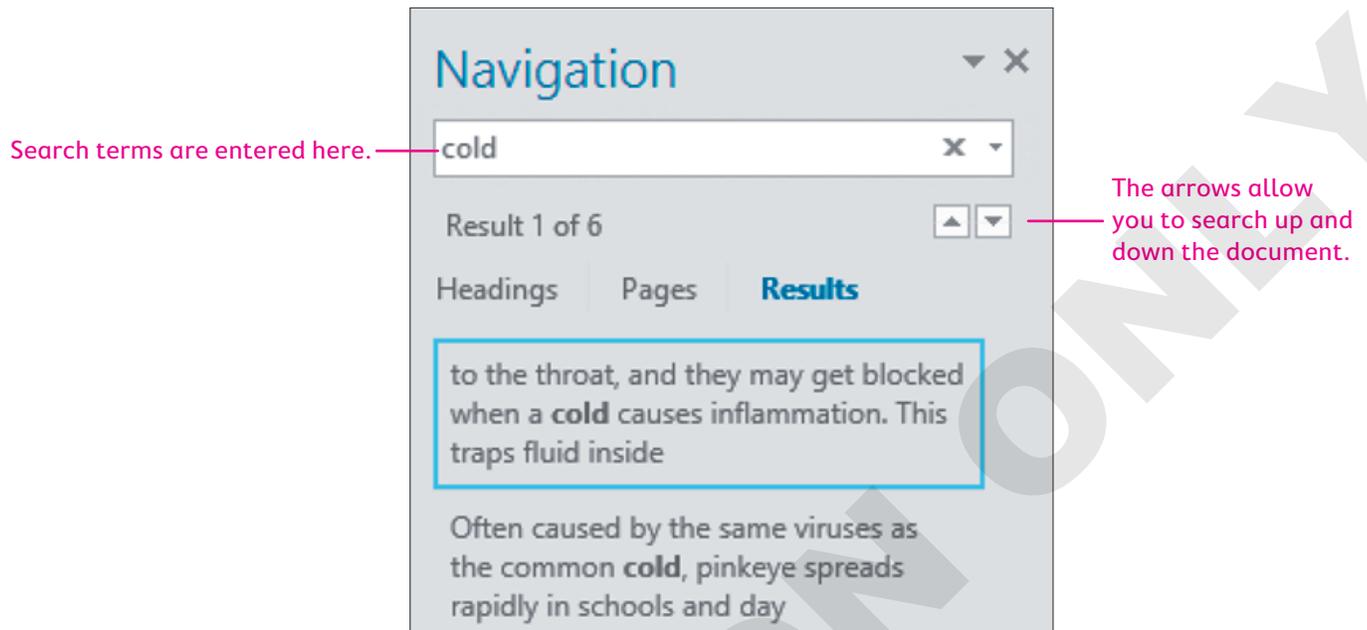
10. Click the **Insert** button and then click **Close**.
11. Scroll to the sixth line in the next paragraph and notice the doctor's name that starts at the end of the line.
12. Position the insertion point after the *y* in *Jay* and tap **Delete**.
13. Press **Ctrl** + **Shift** + **Space** to insert a nonbreaking space.
14. Use the same technique to replace the space following the comma after the last name with a nonbreaking space.
15. Locate Dr. Hirschenfang's name starting at the end of the sixth line in the *Influenza* paragraph and replace the space between *Dr.* and his last name with a nonbreaking space.
16. Save the file.

Navigating Long Documents

A number of helpful tools make it easier to navigate long, complex documents. The Navigation pane provides several ways to move around a document, while Advanced Find and wildcard characters enable specialized searches. Bookmarks are useful if you frequently need to return to the same location in a document. If you want to compare two separate parts of the same document, using the Split Window feature is a great way to do so.

The Navigation Pane

The Navigation pane provides three primary methods for locating a search term in a document: headings, pages, and results.

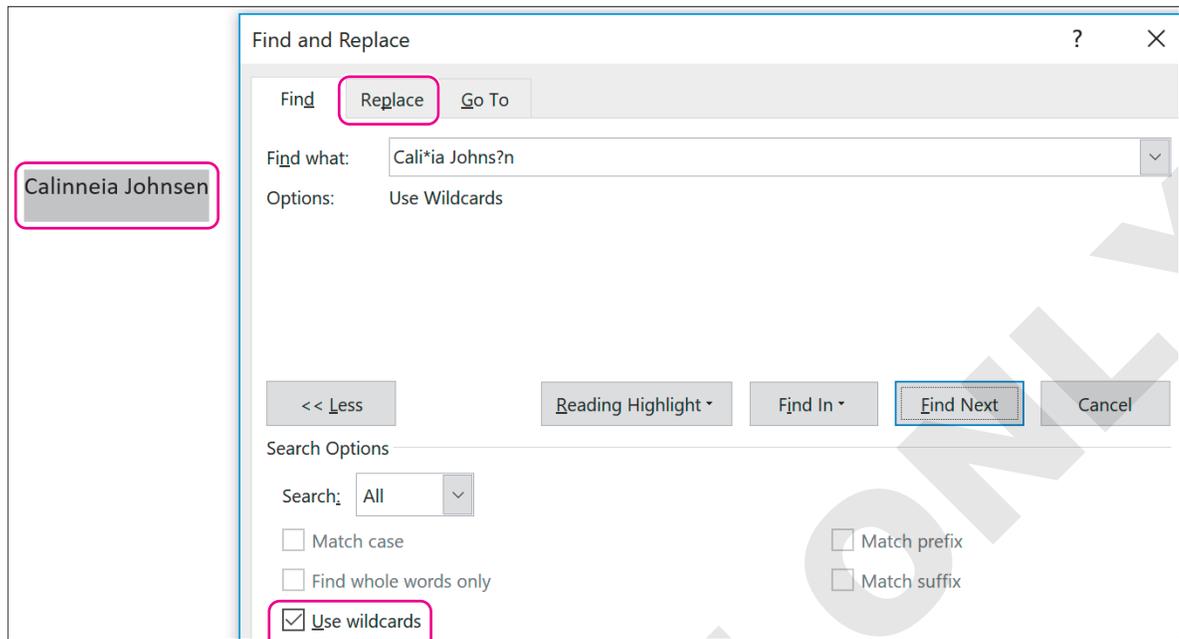


- ▶ **Headings:** The Headings option will list any heading styles in your document. If the search term appears within a heading, it will be highlighted. Click a heading to jump to that part of the document.
- ▶ **Pages:** The Pages option displays thumbnails of pages where the search term appears; clicking a thumbnail jumps the document to that page.
- ▶ **Results:** The Results option displays the search term in context; clicking one of the results jumps the document to that page.

☰ View→Show→Navigation Pane | **Ctrl**+**F**

Advanced Find and Wildcard Characters

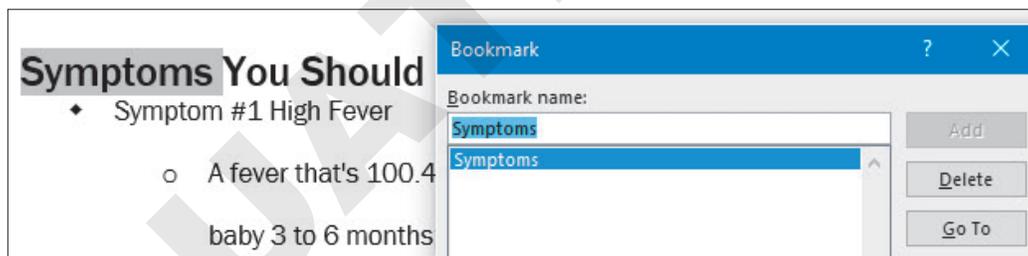
Word can conduct specialized searches. By default, the Find tool does not filter results based on capitalization or whole words only. To filter results based on capitalization or whole words, you can use Advanced Find. In addition, you can use wildcard characters when you're not sure exactly what you're looking for. For example, if you don't know exactly how a name in your document is spelled, but you know parts of it, you can search for it using wildcard characters in place of the parts you don't know. The most common wildcard characters are the question mark (?) and the asterisk (*). The question mark can be used in place of a single unknown character, while the asterisk can be used in place of any number of characters.



☰ Home → Editing → Find menu button ▼ → Advanced Find 🔍

Bookmarks

You can assign a bookmark name to text or other objects in a document. Once a bookmark is set up, you can easily navigate to it by choosing the desired bookmark name from the Bookmark dialog box. A bookmark name can be up to 40 characters, including letters and numbers, but it must begin with a letter and cannot contain spaces or symbols.



☰ Insert → Links → Bookmark 📌

The Split Window

Imagine you want to check whether the executive summary of a report accurately reflects the report's content. Splitting the window is the answer. You can view the executive summary in one

window and scroll through the rest of the document in the other window. Once you've applied the split, you can click and drag the split bar to adjust the height of each window.

Childhood Diseases Seminar

WebMD

Despite vaccines that have made many childhood diseases rare, many common illnesses continue to plague children. Following are descriptions of a few of these illnesses taken from the WebMD website.

cold-like symptoms before the rash is seen. Once the rash appears, the child is usually no longer contagious. Up to 20% of kids get it by age 5, and up to 60% have had it by age 19. The rash usually

Split bar

 View→Window→Split 

DEVELOP YOUR SKILLS: W7-D6

In this exercise, you will navigate in a long document using several techniques: Navigation pane, bookmarks, and split window.

1. Save your file as: **W7-D6-SickKidsRevised**
2. Choose **View→Show→Navigation Pane** and enter **cold** as your search term.

Tip!

You can also open the Navigation pane by pressing **Ctrl+F**.

3. Choose the **Results** option at the top of the Navigation pane and click the fourth result, **Common Cold**.
The document jumps to that location. Notice that the term is highlighted in yellow wherever it appears.
4. Click the **Headings** option at the top of the Navigation pane.
If the document contains heading styles, they are listed here. The headings where the search term appears are highlighted in yellow.
5. Click the **Ear Infection** heading to jump to that part of the document and notice again that the search term is highlighted in yellow.
6. Click the **Pages** option at the top of the pane to see thumbnails of the pages that contain the search term.
7. Click the second thumbnail to jump to that page.
8. Click the up and down arrows in the upper-right corner of the Navigation pane to scroll through all occurrences of the term.
9. Close the Navigation pane.

Use Bookmarks

10. Scroll to page 4 and select **Symptoms** in the heading titled *Symptoms You Should Never Ignore*.
11. Choose **Insert→Links→Bookmark** , type **Symptoms** in the Bookmark Name field, and click **Add**.

12. Press **Ctrl**+**Home** or scroll up to move to the top of the document.
13. Choose **Insert**→**Links**→**Bookmark** .
14. *Symptoms* is already selected, so click **Go To** to jump to the bookmarked text and then click **Close**.

Split the Window

15. Choose **View**→**Window**→**Split** .

A split bar appears across the window. On the right-hand side of the screen are two scroll bars, one for the top window and one for the bottom window.
16. In the top window, scroll to the top of page 1; in the bottom window, scroll to the top of page 3.

You can also split the window into different proportions, allowing more text to show on one side.
17. Position the mouse pointer on the split bar; when it changes to a double-headed arrow, drag the **split bar** up about an inch.
18. Double-click the **split bar** to return to one window.
19. Save and close the file.

Working with Large Tables

If you're working with large tables, making them user-friendly is important. It should be easy for the reader to scan a table and get information. If possible, columns should be wide enough to prevent text from wrapping within the cells. Adding white space within the table makes the text appear less dense. Repeating column headers from one page to the next is essential for the reader to understand the meaning of the data. Sizing a table to best fit the page adds to its readability. Adding a caption helps clarify the table topic.

 Table Tools→Layout→Cell Size dialog box launcher 

 Table Tools→Layout→Alignment→Cell Margins 

DEVELOP YOUR SKILLS: W7-D7

In this exercise, you will modify a large table, making it easier to read by widening columns where text is wrapping, adding white space within cells, and repeating column headers from page to page. You'll also add a caption to the table.

1. Open **W7-D7-SeminarAttendees** from your **Word Chapter 7** folder and save it as: **W7-D7-SeminarAttendeesRevised**

The text is wrapping in several columns, making it difficult to read. At the same time, the table already spans the width of the page. Rotating this document to landscape (horizontal) orientation and changing the table width should solve the problem.

2. Choose **Layout**→**Page Setup**→**Orientation**  and then choose **Landscape**.
3. Choose **Table Tools**→**Layout**→**Cell Size dialog box launcher** .
4. In the Table Properties dialog box, click the **Table** tab, if necessary.

5. Change Preferred Width to **9"** and click **OK**.
Adding white space within the cells will add to the table's readability.
 6. Choose **Table Tools**→**Layout**→**Alignment**→**Cell Margins** .
 7. In the Table Options dialog box, change the top and bottom cell margins to **0.05** and click **OK**.
 8. If necessary, position the insertion point in the first row of the table.
This is the row that will repeat at the top of each page.
 9. Choose **Table Tools**→**Layout**→**Cell Size dialog box launcher**  and click the **Row** tab.
 10. Place a checkmark in the **Repeat as header row at the top of each page** checkbox and click **OK**.
 11. Scroll down to see the header row at the top of page 2.
Now you will add a caption to the table.
 12. Choose **References**→**Captions**→**Insert Caption**  and then click the **New Label** button toward the bottom of the dialog box.
 13. In the New Label dialog box, type **Childhood Diseases Seminar Attendees** and click **OK**; click **OK** again to close the Caption dialog box.
 14. Scroll to the bottom of the document to see the caption.
Captions are typically numbered, but because this is the only table in the document, numbering is not necessary.
 15. If necessary, position the insertion point at the end of the caption and then tap **Backspace** twice to delete the number.
 16. Save and close the file; exit Word.
-

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W7-R1

Create a New Members Handout

Kids for Change wants new members to understand the importance of its motto, Think Globally, Act Locally. One of the members researched the origins of the phrase, and now you've been asked to format the document to make it more engaging. In this exercise, you will use styles to add appeal. You will begin by testing several different styles to see what you like best.

1. Start Word, open **W7-R1-GlobalLocal** from your **Word Chapter 7** folder, and save it as: **W7-R1-GlobalLocalRevised**
2. Position the insertion point in **Introduction** at the top of page 1.
You will apply a built-in style first.
3. Choose **Home**→**Styles** and in the Styles gallery, choose **Heading 1**.
Now you will create a style by example.
4. Select the **Definition** heading for the next paragraph.
5. Choose **Home**→**Font dialog box launcher** .
6. In the Font dialog box, choose **Arial Black, 14 pt**, and **Small Caps**, and then click **OK**.
7. Choose **Home**→**Font**→**Font Color menu button**  and choose **Brown, Accent 1, Darker 25%** from the color pallet.
8. Choose **Home**→**Styles dialog box launcher**.
9. Click the **New Style**  button at the bottom of the task pane.
10. Complete the information at the top of the dialog box:
 - Name: **MyStyle1**
 - Style Type: **Paragraph**
 - Style Based On: **Normal**
 - Style for Following Paragraph: **Normal***Your formatting has been copied into the Formatting area of the dialog box.*
11. If necessary, click the **Add to the Styles gallery** checkbox and click **OK**.
The style name now appears in the Styles gallery on the Ribbon and in the Styles task pane. Next, you will create a style by definition.
12. Scroll down and position the insertion point in the heading, **Origin in Town Planning**.
13. Click the **New Style** button at the bottom of the task pane.
14. Complete the information at the top of the dialog box:
 - Name: **MyStyle2**
 - Style Type: **Paragraph**
 - Style Based On: **Normal**
 - Style for Following Paragraph: **Normal**

15. In the Formatting area, choose **Century Schoolbook, 14 pt**, and center alignment, and then click **OK**.
16. Scroll down and position the insertion point in the heading for the last paragraph, *Origins of the Phrase*, and apply the built-in **Heading 2** style.

Modify a Style

After scanning the different styles, you've decided to modify the Heading 1 style.

17. Position the insertion point in the **Introduction** heading at the top of page 1.
18. Hover the mouse pointer over the *Heading 1* style in the Styles task pane, click the **menu** button ▼, and choose **Modify**.
19. Click the **Format** button at the bottom of the dialog box and choose **Font**.
20. Choose **Bold** in the Font Style field, click the **menu** button ▼ in the **Font Color** field, and choose **Brown, Accent 1, Darker 25%**.
21. Check the **Small Caps** checkbox and click **OK**.
22. Click **OK** in the Modify Style dialog box as well.

Notice that the modifications you made are reflected in the style name in the Styles gallery. Now you need to decide on a style for the subheadings. You will modify the Heading 2 style.

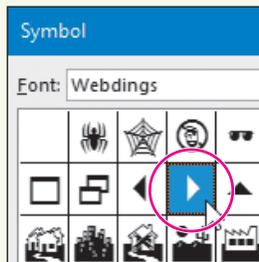
23. Scroll to the last page and click in the heading **Origins of the Phrase**. Hover the mouse pointer over *Heading 2* in the Styles task pane, click the **menu** button ▼, and choose **Modify**.
24. In the Formatting area, click the **Bold** button, click the **menu** button ▼ in the color field, and choose **Brown, Accent 1, Darker 25%**, and then click **OK**.
You are happy with the Heading 2 style, so now you'll apply it to the other subheadings.
25. Scroll up, position the insertion point in the heading **Origin in Town Planning**, and then click the **Heading 2** style in the Styles task pane.
26. Scroll up, position the insertion point in the **Definition** heading, and then apply the **Heading 2** style.
Because you won't be using MyStyle1 and MyStyle2, you will delete them from the Styles task pane.
27. Hover the mouse pointer over *MyStyle1* in the task pane, click the **menu** button ▼, and choose **Delete MyStyle1**.
28. When the message appears confirming the deletion, click **Yes**.
The style was also removed from the Styles gallery on the Ribbon.
29. Use the same technique to delete *MyStyle2*.
30. Close the Styles task pane and then save and close the file.

REINFORCE YOUR SKILLS: W7-R2

Help Kids Cultivate Social and Emotional Skills

Many educational organizations have developed training programs to help teachers work with children in developing social and emotional skills. Kids for Change members are evaluating various programs to determine which program they would like to see implemented in their local schools. In this exercise, you will customize bullet and number formats, use navigation techniques to quickly move around long documents, and format a large table to enhance its readability.

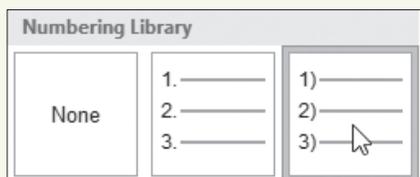
1. Open **W7-R2-SocLearningforKids** from your **Word Chapter 7** folder and save it as: **W7-R2-SocLearningforKidsRevised**
2. Scroll down and position the insertion point in the first bulleted list on page 1.
3. Choose **Home**→**Paragraph**→**Bullets menu button** ▼ and choose **Define New Bullet**.
4. Click the **Symbol** button.
5. Choose the **Webdings** font; scroll to the top of the gallery, if necessary; choose the character shown (location may vary); and click **OK** twice.



6. Position the insertion point in the next bulleted list that starts at the bottom of page 1.
7. Choose **Home**→**Paragraph**→**Bullets menu button** ▼ and choose the same bullet, which appears in the Recently Used Bullets, Bullet Library, and Document Bullets categories.
8. Use the same technique to change the bullets in the last bulleted list at the bottom of page 3.
Now you will remove the new bullet so the next student who uses your computer will have the same experience.
9. Choose **Home**→**Paragraph**→**Bullets menu button** ▼, right-click the new bullet in the Bullet Library area, and choose **Remove**.

Apply Numbers to a List

10. Scroll up, select the list that appears below the heading *The 12 Tools* at the top of page 3, and choose **Home**→**Paragraph**→**Numbering**.
Now you'll choose a different number format for the list.
11. Choose **Home**→**Paragraph**→**Numbering menu button** ▼ and then choose the **Number Alignment: Left** format with parentheses under Numbering Library (location may vary).



Notice that the last three numbers are left-aligned with the numbers above. They should be right-aligned.

12. Choose **Home**→**Paragraph**→**Numbering menu button** ▼ and then choose **Define New Number Format**.
13. Click the **menu** button ▼ in the Alignment field, choose **Right**, and click **OK**.
Notice how the numbers are now aligned.

Navigate in a Document

You know that you'll often have to navigate through this document as team members have questions about its contents, so you want to take some time to practice quick navigation techniques.

14. Press **[Ctrl]+[F]** to open the Navigation pane and then type **toolbox** in the search field.
15. Click the down-pointing arrow at the top of the Navigation pane several times to jump to the term.
16. Make sure the **Results** category at the top of the pane is active; scroll down and click the last result in the list to jump to that location.
17. Click the **Headings** category at the top of the pane and click **Dovetail Learning** to jump to that location.
18. Close the Navigation pane.

Insert a Bookmark

If there is a section of the document that you will return to frequently, using a bookmark provides a way to locate it easily.

19. Double-click **Dovetail** in the heading line.
20. Choose **Insert**→**Links**→**Bookmark**, type **Dovetail** in the Bookmark Name field, and click **Add**.
21. Press **[Ctrl]+[Home]** or scroll up to move to the top of the document.
22. Choose **Insert**→**Links**→**Bookmark**.
23. Click **Go To** in the Bookmark dialog box to jump to the bookmark and then click **Close**.

Split the Window

Now you will compare the mission statements for *Wings for Kids* and *Dovetail Learning*.

24. Choose **View**→**Window**→**Split**  and in the top window scroll to the top of page 1 until the mission statement is visible.
25. In the bottom window, scroll until the mission statement for *Dovetail Learning* is visible.
This is an easy way to compare two different parts of a document.
26. Double-click the split bar in the middle of the window to return to one window.
27. Save and close the file.

Work with a Large Table

You will use the *Members mailing list* to send members the document about social learning. In preparation for that, you will now enhance the table by making it more readable.

28. Open **W7-R2-Members** and save it as: **W7-R2-MembersRevised**
29. Choose **Table Tools**→**Layout**→**Alignment**→**Cell Margins**, change the top and bottom cell margins to **0.08**, and click **OK**.
The table is now spilling over to the next page. You will repeat the header row so it will also appear at the top of the next page.
30. If necessary, position the insertion point in the header row of the table.
31. Choose **Table Tools**→**Layout**→**Cell Size dialog box launcher**.
32. Click the **Row** tab, check **Repeat as header row at the top of each page**, and click **OK**.
33. Scroll down to see the header row at the top of the second page.
34. Save and close the file.

REINFORCE YOUR SKILLS: W7-R3

Format a Report on Childhood Obesity

Kids for Change is sponsoring a seminar on childhood obesity, presented by representatives from the World Health Organization and the Centers for Disease Control and Prevention. The organizations have already submitted background reading for the seminar. In this exercise, you will format the document to make the paragraphs and tables more engaging. You will also use techniques for navigating a long document.

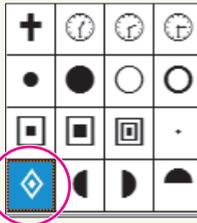
1. Open **W7-R3-Obesity** from your **Word Chapter 7** folder and save it as: **W7-R3-ObesityRevised**
2. If the Styles task pane is not open, choose **Home**→**Styles dialog box launcher** to open it.
3. If necessary, position the insertion point in the heading at the top of the document, and then choose the **Title** style from the task pane.
4. Scroll down to page 2, position the insertion point in the heading **CDC Introduction**, and apply the **Title** style.
5. Scroll back to the top of page 1 and position the insertion point in the first subtitle, which begins with *What can be done*.
6. Apply the **Subtitle** style from the Styles task pane and then apply **Subtitle** to the remaining headings:
 - **General recommendations**
 - **Societal recommendations**
 - **What Needs to Be Done?**
 - **What Can Parents Do?**

You decide that the subtitles are not very appealing, so you will modify the Subtitle style.
7. Position the insertion point in the first subtitle at the top of page 1.
8. Hover the mouse pointer over **Subtitle** in the Styles task pane, click the **menu** button ▼, and choose **Modify** from the menu.

9. In the Formatting area of the dialog box, click the **Italic** button and change the font size to **16 pt**, and then click **OK**.
10. Scroll through the document and notice the subtitles are updated throughout the document.
11. Scroll to the bottom of page 2 and notice the subtitle at the bottom of the page.
It should be moved to the top of the next page.
12. Position the insertion point in front of the subtitle and press **Ctrl**+**Enter** to insert a page break and move the subtitle to the top of the next page.
13. Close the Styles task pane.

Customize Bullet Formats

14. Place the insertion point in the first item of the bulleted list on page 1, choose **Home**→**Paragraph**→**Bullets menu button** ▼, and choose **Define New Bullet**.
15. Click the **Symbol** button in the Define New Bullet dialog box.
16. In the Symbol dialog box, choose the **Wingdings 2** font, scroll to about the middle of the list and choose the symbol shown, and then click **OK** twice.



17. Scroll down to the next bulleted list and click the first item.
18. Choose **Home**→**Paragraph**→**Bullets menu button** ▼ and choose the same button style.
19. Use the same technique to reformat the last bulleted list.

Navigate in a Long Document

20. Scroll to the top of page 2 and select **CDC** in the heading.
21. Choose **Insert**→**Links**→**Bookmark**, type **CDC** in the Bookmark Name field, and click **Add**.
22. Press **Ctrl**+**Home** or scroll up to move to the top of the document.
23. Choose **Insert**→**Links**→**Bookmark**, click the **Go To** button to jump to the bookmark, and then close the dialog box.
24. Press **Ctrl**+**F** to open the Navigation pane and then type **WHO** in the search field.
The document scrolls to the first occurrence of WHO.
25. Click the insertion point in the page and then close the Navigation pane.
26. Choose **View**→**Window**→**Split** and scroll in the bottom pane until the *CDC Introduction* heading appears.
This is a great way to compare different parts of the same document without opening a separate window.
27. Double-click the **split bar** to return to a single window.
28. Save and close the file.

Work with a Long Table

Kids for Change has scheduled its programs and seminar topics well in advance, so it has plenty of time to coordinate the events. However, the table is not easy to read, and it's difficult to locate data. You will format the table to make it easier to work with.

29. Open **W7-R3-Programs** from your **Word Chapter 7** folder and save it as:
W7-R3-ProgramsRevised
30. Position the insertion point in the table and choose **Table Tools**→**Layout**→**Alignment**→**Cell Margins**.
31. Change the top and bottom margins to **0.08** and click **OK**.
The increased margins caused the table to flow to the next page. Next, you will set up the header row to repeat on every page.
32. If necessary, position the insertion point in the header row at the top of the table.
33. Choose **Table Tools**→**Layout**→**Cell Size dialog box launcher**.
34. If necessary, click the **Row** tab, and then check **Repeat as header row at the top of each page** and click **OK**.
35. Scroll to page 2 to see the repeating header row.
36. Save and close the file.

Apply Your Skills

APPLY YOUR SKILLS: W7-A1

Multitask with Styles

When planning a corporate event for a client, Universal Corporate Events representatives are often challenged with juggling details ranging from managing hundreds of hotel reservations and travel accommodations to organizing meals and side trips. Your manager has asked you to research the concept of multitasking and prepare a report on your findings. Your content has been approved, and it is now time to format the document to make it appealing to the reader. In this exercise, you will enhance the document by formatting with styles.

1. Open **W7-A1-Multitasking** from your **Word Chapter 7** folder and save it as:
W7-A1-MultitaskingRevised
You will start by creating a style by example.
2. Select the **Introduction** heading at the top of the document, apply the **Stencil** font, **16 pt**, and center the heading.
3. Open the Styles task pane and click the **New Style** button.
4. Follow these guidelines to complete the top part of the dialog box:
 - Name: **IntroStyle**
 - Style Type: **Paragraph**
 - Style Base On: **Normal**
 - Style for Following Paragraph: **Normal**
5. If necessary, check the **Add to the Styles gallery** checkbox at the bottom of the dialog box and click **OK**.

Notice that the new style appears in the Styles gallery on the Ribbon and in the Styles task pane. Next, you will apply a built-in style and then modify it.

6. Position the insertion point in the next heading, **The multitasking myth**, and apply the **Heading 2** style.
7. Hover the mouse pointer over the *Heading 2* style in the Styles task pane, click the **menu** button ▼, and choose **Modify**.
8. Click the **Format** button at the bottom of the dialog box and choose **Font**.
9. In the Font dialog box, set the font to **Bold, 14 pt**, and the color to **Black, Text 1**.
10. Check the **Small Caps** checkbox and then click **OK** twice.
11. Apply the modified *Heading 2* style to the rest of the subtitles in the document:
 - **You're not really multitasking**
 - **It's slowing you down**
 - **You're making mistakes**
 - **You're not actually good at it**

You decide to change the Introduction heading so it blends better with the subheadings.

12. Position the insertion point in the **Introduction** heading and choose the **Title** style from the Styles task pane.

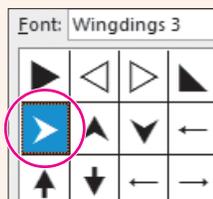
13. You don't plan to use the IntroStyle anymore, so using the Styles task pane, delete the style and then close the task pane.
14. Click the **Home** tab and notice that the IntroStyle has been removed from the Styles gallery on the Ribbon.
15. Save and close the file.

APPLY YOUR SKILLS: W7-A2

Plan a Bicycle Trip in the Loire Valley

A client of Universal Corporate Events is planning a bicycling trip in the Loire Valley of France as a reward for Employee of the Year winners in each of its branch offices. Universal Corporate Events is providing a sample itinerary for the client to review. In this exercise, you will polish the sample itinerary for the trip. The client has also requested a list of châteaux in the Loire Valley, so you will prepare that in a table and format it.

1. Open **W7-A2-LoireTour** from your **Word Chapter 7** folder and save it as: **W7-A2-LoireTourRevised**
2. Position the insertion point in the first bulleted item and define a new bullet using this Wingdings 3 symbol.



Now you'll apply the new bullet to the remaining bulleted items.

3. Position the insertion point in the next bulleted item and choose **Home**→**Paragraph**→**Bullets** menu button ▾.

The new bullet appears in the Recently Used Bullets category.

4. Click the bullet, scroll through the document, and see that the bullet was applied to the rest of the bulleted items.

Next, you will use nonbreaking spaces to keep a name together on a line.

5. Scroll to the second-to-last line in the Day 3 paragraph, position the insertion point after *Leonardo*, and delete the space.
6. Choose **Insert**→**Symbols**→**Symbol** and choose **More Symbols**.
7. Choose **Nonbreaking Space** in the Special Characters tab and finish inserting the character.
Remember the keystrokes for a nonbreaking space: **Ctrl**+**Shift**+**Space**.
8. Position the insertion point after *da*, delete the space, and then press **Ctrl**+**Shift**+**Space** to insert another nonbreaking space.
9. If necessary, display formatting marks and notice the symbol used for nonbreaking spaces.

Navigate in a Long Document

Next, you will insert a bookmark for navigating in the document.

10. Create a bookmark for the text *Day 6*, using **Day6** as the bookmark name.
11. Move to the top of the document and then use the Bookmark feature to jump to Day 6.
Now you will locate a term in the document.
12. Open the Navigation pane, type **Day 1** in the search field, and position the insertion point in the **Day 1** page.
13. If necessary, click the **Headings** button at the top of the Navigation pane; click the **Day 4** heading to jump to that location and then close the Navigation pane.
Next you will split the window so you can compare different parts of the document.
14. Choose **View**→**Window**→**Split** and then scroll the top window to **Day 1** and the bottom window to **Day 6**.
15. Double-click the **split bar** to return to one window.
16. Save and close the file.

Work with a Large Table

You will make some modifications to a table to improve its readability. You'll begin by increasing the cell margins and then repeat the header row for each page.

17. Open **W7-A2-Chateaux** from your **Word Chapter 7** folder and save it as:
W7-A2-ChateauxRevised
18. Position the insertion point in the table, choose **Table Tools**→**Layout**→**Alignment**→**Cell Margins**, and change the top and bottom margins to **0.08**.
19. With the insertion point in the first row of the table, choose **Table Tools**→**Layout**→**Cell Size dialog box launcher**.
20. Use the **Row** tab in the Table Properties dialog box to repeat the header row on each page.
21. Scroll to the top of page 2 to see the repeated header row.
22. Save and close the file.

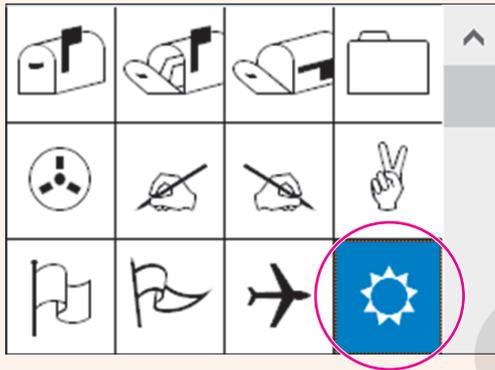
APPLY YOUR SKILLS: W7-A3

Prepare Cuban Travel Information for a Client

Universal Corporate Events has asked you to research information about travel to Cuba, and your research has been approved. In this exercise, you will format the document so it can be presented to clients.

1. Open **W7-A3-CubaTravel** from your **Word Chapter 7** folder and save it as:
W7-A3-CubaTravelRevised
2. Apply the Heading 1 style to the *Cuba Background* heading at the top of the document.
Hint: If necessary, display the Styles task pane.
3. Apply the Heading 2 style to the headings *U.S.–Cuba Relations*, *U.S. Assistance to Cuba*, and *Bilateral Economic Relations*.
4. Scroll down to the *Outdoor Activity* heading and apply the Heading 1 style.

5. Scroll down to the *Top-Rated Cuban Tourist Attractions* heading and apply the Heading 1 style.
Next, you will modify the heading styles.
6. Position the insertion point in the **Cuba Background** heading and modify the Heading 1 style by changing the font color to **Brown, Accent 3**.
7. Scroll to page 3 and notice that the other Heading 1 styles were updated.
8. Position the insertion point in the **U.S.-Cuba Relations** heading and modify the Heading 2 style to use the font color **Brown, Accent 3**.
9. Close the Styles task pane and then scroll down to see that the other Heading 2 headings are updated.
10. Scroll to page 3, position the insertion point in the first bulleted item, and define a new bullet using this Wingdings symbol character.



Format a Table for Readability

11. Scroll to the table and change the top and bottom cell margins to **0.08**.
12. Repeat the header row on all pages.
Now you will add a caption to the table.
13. Scroll to the bottom of the table and position the insertion point on the first blank line below the table.
14. Use the New Label dialog box to insert **Excerpt from PlanetWare Website** as the table caption.
Notice the number 1 appears at the end of the caption. Because there is only one table in the document, the number is not necessary.
15. Delete the number **1** at the end of the caption.
16. Save and close the file; exit Word.

Project Grader

If your class is using eLab (labyrinthelab.com), you may upload your completed Project Grader assignments for automatic grading. You may complete these projects even if your class doesn't use eLab, though you will not be able to upload your work.

PROJECT GRADER: W7-P1

Using Themes, Styles, and Other Tools

This project combines learning objectives from chapters 6 and 7. In this exercise, you will apply formatting to an existing document by using tools that simplify formatting tasks.

1. Download and open your Project Grader starting file.
 - *Using eLab:* Download **W7_P1_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W7_P1_Start** from your **Word Chapter 7** folder.
2. Use these guidelines to insert a Quick Part:
 - Quick Part to insert: **Document Property, Title**
 - Insert it in the empty paragraph at the top of the document.
 - After insertion, the title *The History of Board Games* should be displayed.
3. Insert the **Semaphore** cover page and make these changes to the fields:
 - Date: Enter today's date.
 - Document Subtitle: **Games That Changed the World**
 - Author: Enter your name.
 - Company Name: **Taylor Games**
 - Company Address: Delete the Address field.
4. Apply the **Metropolitan** theme.
5. Apply the **Blue Warm** theme color.
6. At the top of page 2, apply the **Title** style to **The History of Board Games** Quick Part text.
7. Apply the **Basic (Stylish)** style set (the fourth option in the Style Sets list).
8. On page 5, apply the **checkmark** bullet style (located in the Bullets Library) to the five games below the *Other Famous Games in History* heading.
9. On **page 3**, insert a bookmark named **Mansion** in front of *The Mansion of Happiness (1843)* heading.
10. Save your document.
 - *Using eLab:* Save it to your **Word Chapter 7** folder as **W7_P1_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 7** folder as: **W7_P1_Submission**

PROJECT GRADER: W7-P2

History of the Chevrolet Corvette

This project combines learning objectives from chapters 6 and 7. In this project, you will use formatting tools and other features to enhance the Corvette history document.

1. Download and open your Project Grader starting file.
 - *Using eLab:* Download **W7_P2_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W7_P2_Start** from your **Word Chapter 7** folder.
2. Use these guidelines to insert a Quick Part:
 - Quick Part to insert: **Document Property, Title**
 - Insert it in the empty paragraph at the top of the document.
 - After insertion, the title *History of the Chevrolet Corvette* should be displayed.
3. Insert the **Ion (Dark)** cover page and make these changes to the fields:
 - Year: Enter the current year
 - Document Subtitle: **Eight Generations**
 - Author: Enter your name
 - Company Name: Change *Car* to **Cars**.
 - Address: Delete the Address field.
4. Apply the **Berlin** theme.
5. Apply the **Red Violet** theme color.
6. At the top of **page 2**, apply the **Title** style to the **History of the Chevrolet Corvette** Quick Part text.
7. Apply the **Lines (Simple)** style set (the twelfth style on the Built-In style set list).
8. On **page 7**, insert a bookmark named **C5** in front of the *Fifth generation (C5; 1997–2004)* heading.
9. On **pages 7** and **8**, change the bullets in all 20 of the bulleted paragraphs to the **checkmark** bullet located in the Bullets Library.
10. At the end of the text on **page 12**, insert the **Registered Sign** just to the right of the phrase *Registered Trademark*. The symbol should be between the *k* in *Trademark* and the period at the end of the sentence.
11. Save your presentation.
 - *Using eLab:* Save it to your **Word Chapter 7** folder as **P7_P2_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 7** folder as: **P7_P2_Submission**

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W7-E1 That's the Way I See It

You have just started your own personal training business and will advertise your business with an informative brochure (maximum two pages) to be distributed through local businesses in the community. Decide on a name for your business. Include a mission statement and a description of your background qualifications. Create a bulleted list of the services you offer and another bulleted list of the benefits your clients will enjoy. Customize the bullets using a symbol of your choice. Use Word's built-in heading styles to make your brochure professional looking and easy to read. Create a table listing classes you offer, short descriptions of the classes, and the days and times the classes will meet. Apply the table style of your choice and increase the cell margins to add white space. Don't forget your contact information. Feel free to use an Internet search to gather ideas to assist you with content. Save your file as: **W7-E1-Exercise**

W7-E2 Be Your Own Boss

You want to increase your customer base at Blue Jean Landscaping, so you will create a one- or two-page flyer advertising your business. Write an "About Us" paragraph describing the services you offer and include a mission statement. Also, write a paragraph or two about your background qualifications. Include another paragraph about the pesticide safety techniques you employ at your company. Blue Jean Landscaping saves customers money by having them provide the labor for their projects. Create a bulleted list of the physical tasks customers will accomplish to take advantage of your cost-cutting offer. Create a table listing classes you offer, such as "How to Plant Roses," to educate your customers in the skills they need to provide the labor for their gardens. Use built-in heading styles to section off the different parts of the flyer and modify the styles to suit your taste. Customize the bullets for your bulleted list, format the table with a table style, and add white space to the table by increasing cell margins. If necessary, search the Internet for information about landscaping companies to help you with the content. Save the file as: **W7-E2-Landscape**

W7-E3 Demonstrate Proficiency

As the owner of Stormy BBQ, you are proud of serving only locally grown, organic vegetables and free-range, farm-raised pork and beef. Create a two-page flyer to distribute to customers at the cash register. Include a mission statement and a paragraph or two describing the history of Stormy BBQ, and include one or two customer testimonials. Create a bulleted list of the benefits of eating locally produced food. Insert a menu in the form of a table that spans two pages and add a caption to the table. Use custom styles that you create from scratch to section off the topics in your flyer and create custom bullets for your list. Apply a table style to your menu, add white space for ease of reading, and repeat the header row at the top of page 2. Conduct an Internet search if you need help with the menu or benefits of the healthy food you serve. Save the file as: **W7-E3-BBQ**

EVALUATION ONLY

WORD

8

Organizing Long Documents



Plowing through a long document can be challenging for the reader if it is not well organized. Word offers several great tools for organizing documents. A table of contents and an index help readers locate specific topics and terms. Headers and footers display important information, such as page numbers and chapter names. In this chapter, you will work with these tools, organizing long documents and making them more accessible to the reader.

LEARNING OBJECTIVES

- ▶ Create a table of contents
- ▶ Work with multiple headers and footers
- ▶ Insert an index
- ▶ Keep text together
- ▶ Add a watermark

Project: Organizing a Long Document

The Raritan Clinic East Policies and Procedures Manual contains principles and guidelines adopted by the clinic to reach its long-term goals. It influences all major decisions and activities in day-to-day operations. You recently accepted a position in the human resources department at Raritan Clinic. You have been tasked with reviewing the current Policies and Procedures Manual, and you have identified numerous “finishing” features that need to be added to the manual to make it easier to use. By adding a table of contents, index, and headers and footers, you believe the document will be more user-friendly.

Creating a Table of Contents

Readers appreciate a good table of contents. It outlines the document and adds a professional appearance. And if the document is electronic, the table of contents links provide Internet-like navigation.

The Table of Contents (TOC) feature automatically builds a table of contents by gathering up the headings that are formatted with heading styles. The headings in the TOC are organized in the sequence in which they appear in the document. In addition, TOC styles are applied that correspond to the heading levels. The styles then format the table entries. For example, Heading 2 entries are subordinate to Heading 1 entries. You can automatically update a table of contents created with the built-in heading styles.

You can apply a predesigned table of contents format from the Table of Contents gallery, or you can create a custom table of contents, which gives you more control over the formatting.

 References → Table of Contents → Table of Contents 

Creating a Page for the Table of Contents

In most documents, the table of contents appears either at the beginning of the document or just after the title page in documents containing a title page. Because the table of contents is often created after the document is complete, you may need to create a new page to hold the table.

When headers and footers or other page-level formatting such as page numbering appear in a document, it is better to use a section break to create a page to hold the table of contents. This allows flexibility, such as numbering the table of contents page(s) with Roman numerals (i, ii, iii) and the rest of the document with Arabic numerals (1, 2, 3).

Table of Contents Links

A table of contents is inserted as a large field composed of various table entries. Each entry within the table functions as a hyperlink. You can use the links to quickly navigate in the document.

Table of Contents	
Mission Statement	
Scope of Services	Current Document Ctrl+Click to follow link
Patient Management Procedures	

DEVELOP YOUR SKILLS: W8-D1

In this exercise, you will open the Raritan Clinic East Policies and Procedures Manual and review its heading styles. Then you will create a table of contents and use the links to navigate in the document. Finally, you will remove the table of contents.

1. Start Word, open **W8-D1-RaritanP&P** from your **Word Chapter 8** folder, and save it as: **W8-D1-RaritanP&PRevised**
2. Choose **Home**→**Styles dialog box launcher** .
3. Scroll to the first page of the body of the document and position the insertion point in the heading *Mission Statement*.
Notice that Heading 1 in the Styles task pane is highlighted, indicating that it is the style used to format the heading.
4. Position the insertion point in several additional headings on page 2.
Notice that both Heading 1 and Heading 2 styles are on the page.
5. Close the Styles task pane and then position the insertion point in front of the heading *Mission Statement*.
Now you will insert a section break to create a blank page for the table of contents.
6. Choose **Layout**→**Page Setup**→**Breaks**  and then choose **Next Page**.
7. If necessary, display formatting marks; then, scroll up and position the insertion point to the right of the paragraph symbol, just in front of the section break, and tap **Enter**.
8. Choose **References**→**Table of Contents**→**Table of Contents**  and then choose **Automatic Table 2** from the gallery.
9. Scroll up and review the table of contents.
You can see that the headings in the document are used as the table of contents entries.

Navigate Using Hyperlinks

10. Hover the mouse pointer over the *Initial Diagnostic Evaluation* entry in the table and notice the pop-up message.
11. Press **Ctrl** and click the link.
Word jumps to that heading in the document.
12. Scroll up to the top of the table of contents and click the table to select it.
13. Click the **Table of Contents**  button in the upper-left corner and choose **Remove Table of Contents** at the bottom of the menu.
14. Save the file.

The Update Table Button

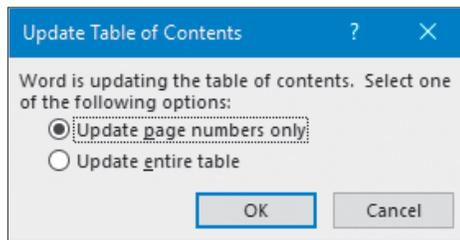
When you make changes to headings or move text in a document, you need to update the table of contents. The Update Table button makes this task easy. Whenever the insertion point is anywhere in the table of contents, two buttons appear in the upper-left corner of the table.

The Table of Contents button displays the Table of Contents gallery, including a command to remove the table.



The Update Table button updates the table of contents with the latest changes.

When you click the Update Table button, a dialog box presents options for updating page numbers only or the entire table. Choose the page numbers option if you have been adding text but haven't changed any headings.



Tip!

You can right-click a table of contents and choose *Update Field* from the menu.

☰ References → Table of Contents → Update Table | F9

The Table of Contents Dialog Box

The Table of Contents gallery provides the fastest method for creating a table of contents, but if you wish to have more control over the formatting of your table, you can use the Table of Contents dialog box. When you use the dialog box, you must also manually add the title that precedes the table. In addition, there are no Table of Contents or Update Table buttons at the top of the table as there are for a table generated from the Table of Contents gallery. To update a manual table of contents, you can use the **F9** shortcut keystroke.



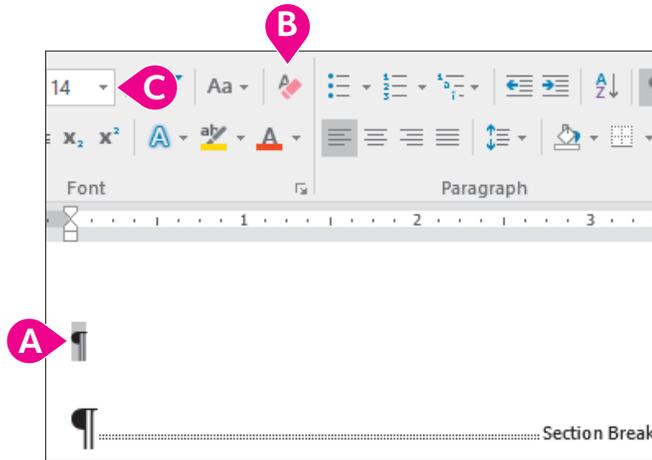
View the video “Create a Custom Table of Contents.”

DEVELOP YOUR SKILLS: W8-D2

In this exercise, you will use the Table of Contents dialog box to insert a custom table of contents. Then you will edit a heading and update the table of contents.

1. Save your file as **W8-D2-RaritanP&PRevised** and, if necessary, display formatting marks.
The insertion point should be just to the left of the section break at the top of the blank table of contents page, before the paragraph mark.
2. Tap **Enter** to create a new, blank line.
The blank line will hold the title. Next you will reformat its paragraph symbol with your desired title formatting.

- Follow these steps to format and add the table title:



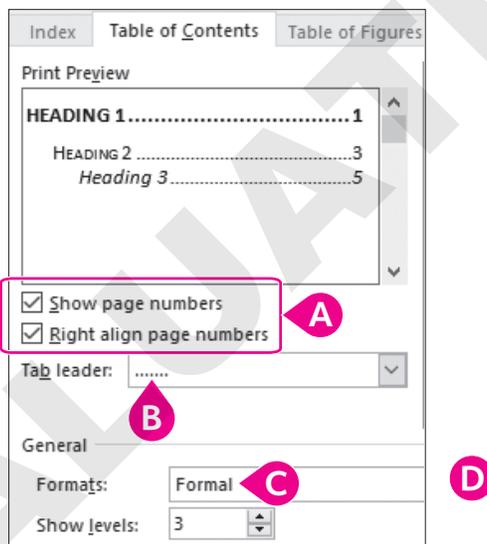
- Select this paragraph symbol.
- Choose **Home**→**Font**→**Clear All Formatting**.
- Change the font size to **14 pt**.

- Type **Table of Contents** and tap **Enter**.

- Choose **References**→**Table of Contents**→**Table of Contents** .

- Choose **Custom Table of Contents** at the bottom of the gallery to open the Table of Contents dialog box.

- Follow these steps to generate a table of contents:



- Make sure these checkboxes are checked.
 - Make sure dots are chosen here.
 - Choose **Formal** as the format.
 - Click **OK**.
- Scroll to the bottom of the table and delete the extra paragraph symbol.

Edit a Heading and Update the Table of Contents

9. Locate the heading *Patient Attendance and Billing* on page 4 of the document and change **Attendance** to: **Appointments**

Now that you have made a change in a heading, you need to update the table of contents.

10. Scroll up and position the insertion point in the table of contents.

There is no Update Table button in the upper-left corner of the table.

11. Tap **F9** to begin the update; when the Update Table of Contents dialog box appears, choose **Update Entire Table** and click **OK**.

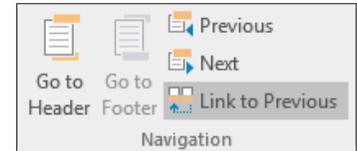
The word Attendance changed to Appointments.

Table of Contents¶	
MISSION STATEMENT.....	
SCOPE OF SERVICES.....	
PATIENT MANAGEMENT PROCEDURES.....	
ENTRY INTO SERVICES.....	
PATIENT APPOINTMENTS AND BILLING.....	
PATIENT RECORDS.....	

12. Save your file.

Multiple Headers and Footers

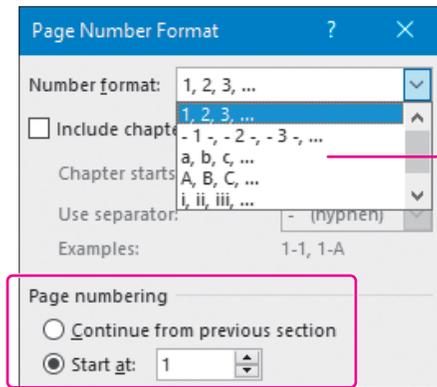
Initially, the header and footer content is the same throughout a document because the Link to Previous feature is turned on by default, as shown in this illustration.



When a document contains multiple sections, you can break the link between sections and thereby create a new header and footer for each document section. For example, suppose you want to number the front portion of a long document using small Roman numerals and the body of the document using Arabic numerals. Separating the document into sections is the first important step before creating multiple headers and footers within a document.

Restarting and Formatting Page Numbers

When you have more than one section in a document, you may wish to control the starting page number within a section. Typically, the body of a document should start at page 1 rather than continuing the Roman numerals from the front matter. You may also want to control the page number formats. The Page Number Format dialog box provides options to restart numbering and to modify the number format, such as changing from Roman numerals to Arabic numerals.

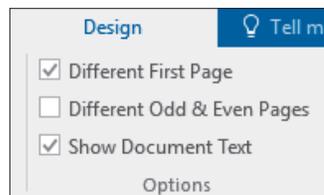


You can choose from a variety of page numbering formats.

You can continue page numbering from the previous section or restart numbering with a specific number.

Different First Page Header or Footer

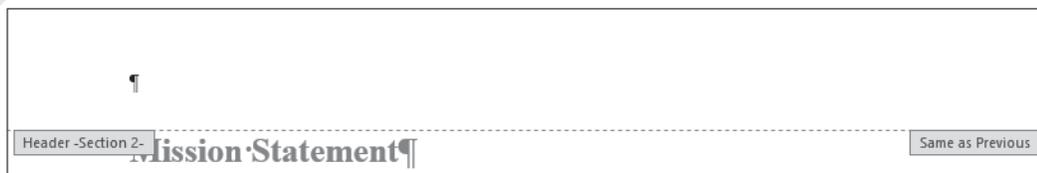
There may be times when all you want to do is set up a different header or footer on the first page of a document. For example, suppose you want all pages of a document numbered in the footer area of each page except for the cover page. You can set a different first page header or footer simply by choosing the Different First Page option in the Header & Footer Tools Design contextual tab.



DEVELOP YOUR SKILLS: W8-D3

In this exercise, you will insert header text that will appear in both sections of the document. You will also break the connection between footers so you can have different footers in each section, and then you will change the starting page number on the second page of the document.

1. Save your file as **W8-D3-RaritanP&PRevised** and, if necessary, display formatting characters.
2. Position the insertion point in **section 2**, which begins with *Mission Statement*.
3. Choose **Insert**→**Header & Footer**→**Header**  and then choose **Edit Header**.
4. Take a moment to observe the header area.

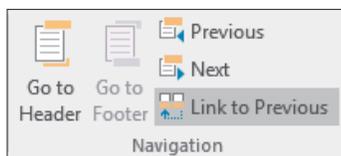


The Header -Section 2- tab indicates that the insertion point is in the header area of section 2; the Same as Previous tab indicates that text you type in section 2 will carry over to the previous section. In other words, the sections are linked. You want the header sections to be linked in this instance because the word DRAFT should appear on all pages. You'll add that next.

5. Tap **Tab** to position the insertion point at the center of the header area and type: **DRAFT**
6. Format the header text with **Bold, 14 pt**, and then double-click in the body of the document to close the header area.
7. Scroll up to the table of contents.

Notice that the word DRAFT appears in the header. That's because the headers in both sections are linked. Now you will add a footer that appears in only one section.

8. Scroll down and position the insertion point in **section 2**.
9. Choose **Insert**→**Header & Footer**→**Footer**  and then choose **Edit Footer**.
Notice the Same as Previous tab in the footer area. You don't want the footer text to appear on the table of contents page, so you will break the link.
10. Choose **Header & Footer Tools**→**Design**→**Navigation**.
The Link to Previous button is highlighted, meaning it is turned on and the footers in sections 1 and 2 are linked.

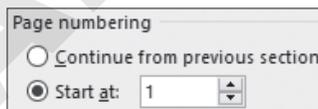


11. Click the **Link to Previous**  button to turn it off and break the link between the two sections.
The Same as Previous tab at the right side of the footer area disappears.
12. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Footer**  and then choose **Blank**.
13. Click **Type Here** and type: **Policies & Procedures Manual**
14. Tap **Tab** to position the insertion point in the center of the footer area and then type: **Raritan Clinic East**
15. Tap **Tab** to position the insertion point at the right side of the footer.
16. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .
17. Choose **Current Position** and then choose **Plain Number**.

Change the Starting Page Number

You want to start numbering with a 1 on the first page of the document body.

18. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .



19. Choose **Format Page Numbers** and then choose **Start At**.
Number 1 is chosen automatically, but you could change it if you needed to.
20. Click **OK** to restart page numbering with a 1 and then double-click in the document body to close the header and footer areas.
21. Scroll up and notice the footer does not appear on the table of contents page.
22. Scroll down and observe the footer text in the rest of the document.
Because the page numbering changed, you need to update the table of contents again.

23. Scroll to the table of contents and position the insertion point in the table of contents.
24. Tap **[F9]**, choose **Update Entire Table**, and click **OK**.
25. Save your file.

Creating an Index

Adding an index to a document gives the reader an easy way to find important words. To create an index, you mark the entries and then generate the index. The entries you mark are sorted alphabetically, and their page numbers are inserted.

Marking Index Entries

Marking index entries and subentries is a case-sensitive action. If you mark all occurrences of a word such as *Billing* for inclusion in the index, only those occurrences of the word in which the *B* is capitalized are included. So it's important to consider which occurrences you want marked before selecting Mark All.



View the video “Main Entries and Subentries.”

☰ References→Index→Mark Entry or References→Index→Insert Index or References→Index→Update Index

DEVELOP YOUR SKILLS: W8-D4

In this exercise, you will mark index entries and subentries in preparation for generating an index.

1. Save your file as: **W8-D4-RaritanP&PRevised**
2. Go to the first page of the body of the manual and select the heading **Mission Statement**.
3. Choose **References→Index→Mark Entry** .

Now you will edit the main entry text.
4. Type **Goals** in the Main Entry field to replace the text that was automatically inserted in the Mark Index Entry dialog box.

The text that was in the field came from the words you selected in the document. You can always replace or edit the suggested entries in this manner.
5. Click **Mark** at the bottom of the dialog box.

Now you will examine an index code.
6. If necessary, drag the dialog box to the side and notice that the code `{ XE Goals }` was inserted into the document.

This code identifies Goals as a main index entry.
7. Select the word **specialties** at the end of the second line in the second paragraph under the *Mission Statement* heading.
8. Click the **Mark Index Entry** dialog box to activate it and then click **Mark** to use the proposed text as the main entry.
9. Select **General Medicine** in the first line of the third paragraph below *Scope of Services*, click the dialog box to activate it, and click **Mark**.
10. Scroll down and select **Patient** in the heading *Patient Appointments and Billing*, click the dialog box, and click **Mark**.

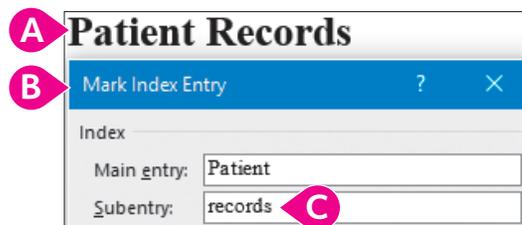
Mark All Entries

Depending on the nature of the document you are marking, there may be text you want to mark every time it appears.

11. Select **Billing** in the heading *Patient Appointments and Billing* and then click the dialog box.
12. Click **Mark All** to mark all occurrences of *Billing* for inclusion in the index.
Remember, it only marks Billing if it begins with a capital letter.
13. Select **billing** toward the end of the first line in the third paragraph below *Patient Appointments and Billing*, click the dialog box, and click **Mark All**.

Mark Subentries

14. If necessary, scroll down to the *Patient Records* heading; then follow these steps to mark records as a subentry:



- A Select **Patient** in the heading.
 - B Click the **Mark Index Entry** dialog box to activate it.
 - C Type **records** in the Subentry field and click **Mark**.
15. Navigate to the second paragraph below the *Patient Records* heading, select **files** in the first line, and click the dialog box to activate it.
 16. Double-click **files** in the Main Entry field and then press **Ctrl+X**.
 17. Click the **Subentry** field and press **Ctrl+V** to paste *files* into the field.
 18. Type **Patient** in the Main Entry field and click **Mark**.
 19. Close the Mark Index Entry dialog box.
 20. Save your file.

Generating Index Entries Using a Concordance

If a document is extremely long, marking index entries can be overwhelming. There is an automatic option for marking words and phrases to be included in an index. This option allows you to create a list of words and phrases you want to include and saves it as a separate file that acts as a **concordance** file.

When you use a concordance file to generate an index, it's important to know how it works. These guidelines will provide you with some basic information:

- ▶ The list of words and phrases to be included as main entries should be typed in one column straight down the left margin of the document or in the first column of a table.
- ▶ The document should contain only the words and phrases to be marked.

- ▶ To mark entries with subentries, create the concordance using a table layout. In the first column, type the words you want to mark as the main entry. In the second column, type the main entry followed by a colon, followed by the text for the subentry, without spaces.

patient	patient:records
---------	-----------------

- ▶ Entries can be listed in any order in the concordance. They will be sorted and grouped alphabetically when you generate the index. However, sorting the words helps identify duplicate words in the concordance.

DEVELOP YOUR SKILLS: W8-D5

In this exercise, you will mark index entries using a concordance document.

1. Save your file as: **W8-D5-RaritanP&PRevised**
2. Open **W8-D5-P&PConcordance** from your **Word Chapter 8** folder.
3. Scroll through the document, review its contents, and then close the document.
4. Position the insertion point anywhere on the title page at the top of the document.
5. Choose **References**→**Index**→**Insert Index** .
6. Click **AutoMark** at the bottom of the dialog box to display the Open Index AutoMark File dialog box.
7. Navigate to your **Word Chapter 8** folder and double-click **W8-D5-P&PConcordance**.

Although nothing appears to happen, the list of words and phrases in the concordance is compared with the manual list. When a word is located, the entry is automatically marked in the manual list.

8. Scroll through and review the document.
Notice the numerous index marks that were added from the concordance in addition to the individual marked items from the previous exercise.
9. Turn off formatting marks.
Because index codes can be quite lengthy, displaying them can cause text to roll onto other pages. Turning off formatting marks ensures that page numbers are accurate.
10. Save the file.

Inserting and Updating the Index

After all the index entries are marked, you can use the Index dialog box to insert the index. You can choose the overall format for the index and select several other formatting options. You can update an index in the same manner as a table of contents.

There are several ways to modify an index once you create it:

- ▶ Use the Index dialog box to change various formatting options.
- ▶ Format the index directly.
- ▶ Change the text of an entry by replacing it directly in the code that was originally created and then update the index.
- ▶ Delete an entry by removing the code and updating the index.

Note!

The format that's active in the Index dialog box will be reapplied if you update the index.

 References→Table of Contents→Update Index | 

DEVELOP YOUR SKILLS: W8-D6

In this exercise, you will generate and format an index.

1. Save your file as: **W8-D6-RaritanP&PRevised**
2. Press **Ctrl+End** or scroll down to move to the end of the document.
An index should begin on a blank page.
3. Type the heading **Index** and tap **Enter**.
4. Select the heading and format the text as **Bold, 16 pt.**
5. Position the insertion point on the blank line below the Index heading and choose **References**→**Index**→**Insert Index** .
6. Choose **Formal** from the Formats list at the bottom of the dialog box and click **OK**.

Modify the Index Format

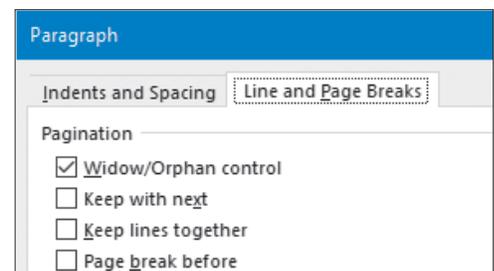
7. Click anywhere in the index and choose **References**→**Index**→**Insert Index** .
8. Choose **Modern** from the Formats list and then choose **Run-In** at the top-right corner.
9. Click **OK**; click **OK** again when the message appears asking if you want to replace the index.
The new index is inserted with the Run-In number style. Notice how the style affects the subentries. You've decided you like the previous indented subentries.
10. Click **Undo**  to reverse the change.
11. Save the file.

Keeping Text Together

If you're working on a long document that goes through multiple revision cycles, controlling pagination can be a challenge. Several options in the Paragraph dialog box can be helpful.

- ▶ **Widow/Orphan Control:** Places at least two lines of a paragraph at the top or bottom of a page; checked by default
- ▶ **Keep with Next:** Forces a paragraph to appear with the paragraph that follows it; often used to keep a heading with the following paragraph
- ▶ **Keep Lines Together:** Prevents a page break in the middle of a paragraph
- ▶ **Page Break Before:** Forces a page break before a specific paragraph

You can further control text by specifying how often Word automatically hyphenates words that are too large to fit at the end of a line. The Hyphenation tool is found in the Page Setup group of the Layout tab. To track how many lines are being used in a page, section, or throughout a document, use the Line Numbers tool found in the same group.



DEVELOP YOUR SKILLS: W8-D7

In this exercise, you will use the *Keep with Next* option to ensure that specified segments of text stay together when a document is automatically paginated.

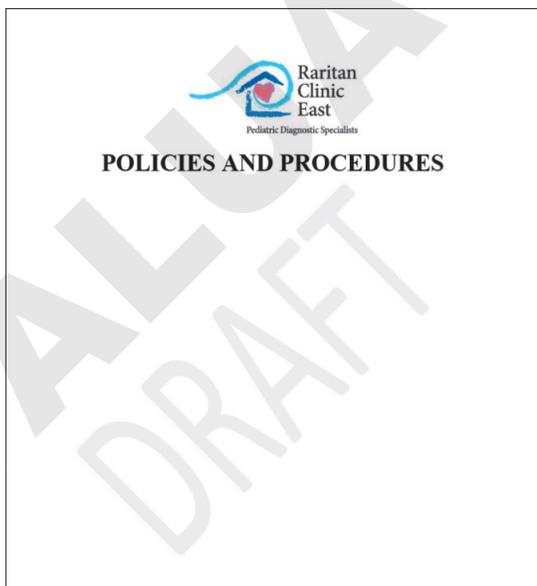
1. Save your file as: **W8-D7-RaritanP&PRevised**
2. On the first page of the document body, select the **Patient Management Procedures** heading and the **Entry into Services** subheading.

A heading should not appear alone at the page bottom. Although that's not the case now, further editing may split a heading from the paragraph that follows.

3. Choose **Home**→**Paragraph dialog box launcher** .
4. If necessary, click the **Line and Page Breaks** tab, check **Keep with Next**, and click **OK**.
This ensures the heading, the subheading, and the paragraph following the subheading will stay together during future edits and automatic pagination.
5. Scroll down to the next page and select the **Patient Appointments and Billing** heading.
6. Choose **Home**→**Paragraph dialog box launcher** , check **Keep with Next**, and click **OK**.
7. Save your file.

Watermarks

A **watermark** is text or a graphic placed behind text or other objects in a document; it is visible only in Print Layout or Read Mode view, and on any physically or digitally printed (such as PDF) versions of the document. Some common watermarks include a faint image of the word *Draft* or *Confidential* in the background.



 Design→Page Background→Watermark 

DEVELOP YOUR SKILLS: W8-D8

The changes made to the Policies and Procedures Manual need to be approved by your manager. Although the word DRAFT appears in the header, you've decided that using the word as a watermark would be more effective. In this exercise, you will delete the term in the header and then add a watermark to the document.

1. Save your file as: **W8-D8-RaritanP&PRevised**
2. Position the insertion point at the top of the document and double-click the header area to open it.
3. Select the word **DRAFT** and tap **Delete**.
4. Double-click in the body of the document to close the header area.
5. Choose **Design**→**Page Background**→**Watermark**  and then choose **Draft 1** from the gallery.
6. Scroll through a few pages to view the watermark.
7. Save and close the file.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W8-R1

Organize a Document with a TOC and Headers and Footers

Kids for Change is providing background reading for its next monthly meeting in which it will brainstorm new ideas to help kids in the community thrive. In this exercise, you will add a table of contents and headers and footers to make the document more accessible to readers.

1. Open **W8-R1-Organizations** from your **Word Chapter 8** folder and save it as: **W8-R1-OrganizationsRevised**
2. If necessary, display formatting marks; then choose **Home**→**Styles dialog box launcher** to open the Styles task pane.
3. Starting on the first page of the main body of the document, position the insertion point in the headings and notice the heading styles in effect.
4. Close the Styles task pane.
5. On page 2, find the section break at the top of the page and position the insertion point on the blank line above it.
6. Choose **References**→**Table of Contents**→**Table of Contents** and then choose **Automatic Table 1** from the gallery.

Modify a Heading

7. Scroll to page 3 and, in the first subheading below *Change for Kids*, select **Tutoring** and replace it with: **Teaching**
8. On page 2, position the insertion point in the table of contents and click **Update Table** at the top of the table of contents border.
9. Choose **Update Entire Table** and click **OK**.

Create a Custom Table of Contents

10. Choose **References**→**Table of Contents**→**Table of Contents** and then choose **Custom Table of Contents**.
11. Make sure all three checkboxes are checked and then, if necessary, choose **Formal** from the Formats drop-down list.

The screenshot shows the 'Table of Contents' dialog box. In the top section, three checkboxes are checked: 'Show page numbers', 'Right align page numbers', and 'Use hyperlinks instead of page numbers'. Below these is a 'Tab leader' field with a dropdown arrow. The 'General' section contains a 'Formats' dropdown menu with 'Formal' selected and circled in red. Below that is a 'Show levels' dropdown menu set to '3'.

12. Click **OK**; when the message appears confirming the replacement, click **OK** again.

Add Multiple Headers and Footers

13. Position the insertion point in **section 2** of the document, which begins with *Introduction*.
14. Choose **Insert**→**Header & Footer**→**Header** and then choose **Edit Header**.
Notice the Same as Previous tab at the right side of the header area. You will now break the link between sections 1 and 2.
15. Choose **Header & Footer Tools**→**Design**→**Navigation**→**Link to Previous** .
Notice that the Same as Previous tab no longer appears at the right side of the header.
16. Tap **Tab** to position the insertion point in the center of the header and type: **Kids for Change**
17. Double-click in the body of the document to close the header area.
18. Scroll up and notice that the header doesn't appear on pages 1 and 2; scroll down and observe the header on pages 3 and 4.
19. If necessary, position the insertion point in the page starting with *Introduction*, which is in section 2.
20. Choose **Insert**→**Header & Footer**→**Footer** and then choose **Edit Footer**.
Notice the Same as Previous tab at the right side of the footer area.
21. Choose **Header & Footer Tools**→**Design**→**Navigation**→**Link to Previous**  to break the link between sections 1 and 2.
22. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Footer** and then choose **Austin**.
Notice that the Austin format placed a border around the page and that page numbering starts at page 2. You will now change the numbering to start on page 1.
23. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number**  and then choose **Format Page Numbers**.
24. Choose **Start At** from the bottom of the Page Number Format dialog box.
The number defaults to 1, which is what you want.
25. Click **OK** and then double-click in the body of the document to close the footer area.
26. Scroll down and notice the numbering on pages 3 and 4; scroll up and notice that there are no footers on pages 1 and 2.
27. Save and close the file.

REINFORCE YOUR SKILLS: W8-R2

Add an Index to a Document

The leader for the next Kids for Change monthly meeting is providing members with a document containing ideas for how kids can promote sustainability, which is the topic of the meeting. In this exercise, you will create an index for the document so members can easily locate important terms.

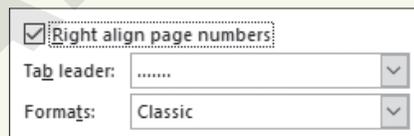
1. Open **W8-R2-Sustainability** from your **Word Chapter 8** folder and save it as: **W8-R2-SustainabilityRevised**
2. If necessary, display formatting marks; then select **wood products** in the first bullet point.
3. Choose **References**→**Index**→**Mark Entry**.

This places wood products in the Main Entry field.

4. Type **salvaged** in the Subentry field and click **Mark**.
Notice the colon between wood products and salvaged in the index code in the document. This indicates that salvaged is a subentry of wood products.
5. Select **salvaged** in the Subentry field, type **recycled** in its place, and click **Mark**.
This adds another subentry for wood products.
6. Select **light bulbs** in the third bullet point and then click the dialog box to activate it.
7. Type **fluorescent** in the Subentry field and click **Mark**.
8. Change the subentry text to **standard** and click **Mark**.
This adds another subentry for light bulbs.
9. Select **paper products** in the fifth bullet point, click the dialog box, and click **Mark**.
10. Select **recycle** in the second line of the sixth bullet point and then click the dialog box.
11. Mark these terms as subentries for *recycle*:
 - **wood products**
 - **paper products**
 - **plastic containers**
 - **cell phones**
 - **electronics**
12. Close the dialog box.

Insert an Index

13. Press **Ctrl**+**End** or scroll down to move to the end of the document and then press **Ctrl**+**Enter** to insert a page break.
14. Type **Index** and tap **Enter**; format the heading with bold, 16 pt; and position the insertion point on the blank line below the heading.
15. Turn off formatting marks.
Remember, displaying index codes can affect page numbering.
16. Choose **References**→**Index**→**Insert Index** .
17. Follow these guidelines to complete the index:
 - Choose **Classic** in the Formats list.
 - Check the **Right align page numbers** checkbox.
 - Choose **dots** in the Tab Leader field.



18. Click **OK**.

Modify an Entry and Update the Index

19. Scroll to the second-to-last bullet point and select **Computer Takeback Campaign**.
20. Choose **References**→**Index**→**Mark Entry**.
This phrase will be a subentry under recycle, so you will cut the term and paste it into the Subentry field.

21. Press **Ctrl**+**X**, position the insertion point in the **Subentry** field, and press **Ctrl**+**V**.
22. Type **recycle** in the Main Entry field and click **Mark**.
23. Close the dialog box and scroll down to the index.
24. Turn off formatting marks.
Formatting marks were turned on when you marked the last entry.
25. Hover the mouse pointer over the index, right-click, and choose **Update Field**.

Finalize the Document

This document will go through some revisions, so you want to be sure the lines in the second-to-last bullet point don't split between pages if repagination takes place.

26. Scroll up and select the bullet point that begins with *Recycle old electronics*.
27. Choose **Home**→**Paragraph**→**dialog box launcher**.
28. If necessary, click the **Line and Page Breaks** tab, check **Keep Lines Together**, and click **OK**.
Now you will insert a DRAFT watermark so this document isn't mistaken for the final version.
29. Choose **Design**→**Page Background**→**Watermark**  and choose **Draft 2** from the gallery.
30. Save and close the file.

REINFORCE YOUR SKILLS: W8-R3

Organize a Long Document

Kids for Change is planning a fair, Sustainability for the Twenty-First Century. One of the members has prepared a report of background information that will be used to kick off the planning session. You have been asked to organize the document to make it more accessible for the reader. In this exercise, you will create a table of contents and an index and insert headers and footers.

1. Open **W8-R3-WikiSustain** from your **Word Chapter 8** folder and save it as:
W8-R3-WikiSustainRevised
2. If necessary, display formatting marks; then scroll through the document and observe the heading styles.
You will insert a new page and generate the table of contents.
3. On the second page, position the insertion point in front of *Introduction*.
4. Choose **Layout**→**Page Setup**→**Breaks** and insert a Next Page section break.
5. Scroll up and position the insertion point in front of the section break (to the right of the paragraph symbol) and tap **Enter**.
6. Choose **References**→**Table of Contents**→**Table of Contents**→**Automatic Table 2**.

Update the Table of Contents

7. Hover the mouse pointer over the *Energy* link in the table of contents and then press **Ctrl** and click the link to jump to that heading in the document.
8. Position the insertion point at the end of the *Energy* heading, tap **Spacebar**, and type:
consumption

9. Update the entire table of contents.

Now you'll change the table of contents format.

10. Choose **References**→**Table of Contents**→**Table of Contents**→**Custom Table of Contents**, choose the **Formal** format if necessary, click **OK**, and then choose **Yes** to replace the table of contents.

Add Headers and Footers

11. Scroll down and position the insertion point in **section 2**, which begins with *Introduction*.
12. Choose **Insert**→**Header & Footer**→**Header**→**Edit Header** and break the link between sections 1 and 2.
13. Tap **Tab** twice to position the insertion point at the right side of the header area and then type **Sustainability in the Twenty-First Century** and close the header area.
The header appears throughout section 2 but not in section 1.
14. Position the insertion point in **section 2**, choose **Insert**→**Header & Footer**→**Footer**→**Edit Footer**, and break the link.
15. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Footer**→**Austin**.
Now you will set the page numbering to start at 1 in section 2.
16. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** and then choose **Format Page Numbers**.
17. Set the numbering to start at 1 and then close the footer area.

Create an Index

18. Select the **Atmosphere** heading toward the top of the new page 1 and mark it as an index entry.
19. Type **global warming** in the Subentry field and click **Mark**.
20. Select the text in the Subentry field, type **carbon reduction** in its place, and click **Mark**.
21. Select the **Subentry** text, type **air pollution:nitrogen oxides** (no spaces surrounding the colon), and click **Mark**.
Whether you're creating a concordance or marking entries in the Mark Index Entry dialog box, the word to the right of the colon is a subentry of the word on the left.
22. Now mark these items in the Subentry field:
 - **air pollution:sulfur oxides**
 - **air pollution:photochemical smog**
 - **air pollution:acid rain**
 - **air pollution:sulfate aerosols**
23. Click in the document, scroll down and select **Management of human consumption** toward the bottom of page 2, and then click the dialog box to activate it.
24. Type **Energy Consumption:increase in CO2** in the Subentry field and click **Mark**.

25. Mark these entries in the Subentry field:
 - **Energy Consumption:fossil fuel emissions**
 - **Energy Consumption:climate change**
 - **harvesting rainwater**
 - **ethical consumerism**
 - **local food production**
 - **circular material flow**
 - **renewable sources**
 - **industrial ecology**
26. Close the dialog box.
27. Position the insertion point at the end of the document, create a new page for the index, and then turn off formatting marks.

Remember, the index codes can cause a change in pagination.
28. Type **Index** and tap ; format the text with bold, 14 pt; and then position the insertion point in the blank line below the text.
29. Insert an index using the Modern format, right-align page numbers, and use dots as the tab leader.

Notice the subentries under air pollution and Energy Consumption. Now you'll mark another entry and then update the index.
30. Scroll to page 1, select the **Freshwater and oceans** heading, and mark it as an index entry.
31. Click in the document, select the **Land use** heading on page 2, mark it as an index entry, and then close the Mark Index Entry dialog box.
32. Turn off formatting marks.

Word turned on formatting marks when you marked the new index entries.
33. Position the insertion point in the index and tap .

Keep Text Together

If this document is revised, using some pagination features will simplify the process. In this example, you want the Management of human consumption heading to always be at the top of a new page.

34. Scroll to page 2 and position the insertion point in front of *Management of human consumption*.
35. Choose **Home**→**Paragraph dialog box launcher** and, if necessary, click the **Line and Page Breaks** tab.

Some pagination options are already in place for this text.
36. Check the **Page break before** checkbox and click **OK**.

This ensures that this heading will always start on a new page. Because pagination has changed, it's a good idea to update the table of contents and the index.
37. Position the insertion point in the table of contents and update the entire table.
38. Position the insertion point in the index and tap .
39. Save and close the document.

Apply Your Skills

APPLY YOUR SKILLS: W8-A1

Finalize a Report

Universal Corporate Events sent you to Munich on a familiarization trip. You have completed the content for your report on the trip and now will apply some formatting. In this exercise, you will create a table of contents to make it easy to locate specific topics in the report and will also add a header and footer.

1. Open **W8-A1-Munich** from your **Word Chapter 8** folder and save it as: **W8-A1-MunichRevised**
2. Open the Styles task pane, scroll through the document to observe some of the heading styles in use, and then close the task pane.
3. Position the insertion point in front of *Introduction* on the first page of the body and insert a **Next Page** section break.
4. If necessary, display formatting marks, scroll up and position the insertion point in front of the section break before the paragraph mark, and tap **Enter**.
5. Insert an **Automatic Table 1** table of contents and use the **Parks** hyperlink to jump to that heading.
6. Position the insertion point at the end of the heading, tap **Spacebar**, and type: **and recreation**
7. Update the table of contents to reflect the change.
8. Open the Table of Contents dialog box, apply the **Classic** format, choose the dots from the Tab Leader drop-down list, and click **OK**.
9. When the message box appears confirming the replacement, click **Yes**.
10. Position the insertion point in **section 2**, which begins with *Introduction*, edit the header, and break the link between sections 1 and 2.
11. Insert a header using the **Banded** style from the Header gallery; close the header area.
12. With the insertion point in section 2, edit the footer to break the link between sections 1 and 2, and then insert a footer using the Banded style.
13. Set up the page numbering to start at **1** in section 2 and then close the footer area.
14. Scroll to the Table of Contents and update it.
15. Save and close the document.

APPLY YOUR SKILLS: W8-A2

Create an Index and Use Pagination Options

Universal Corporate Events has asked you to do some research on Bangalore for a client. Now that you've completed the research, you will add an index to make it easy for the client to locate important terms. In this exercise, you will mark entries and subentries and use a concordance to create the index. Then you will make additions to the index and update it.

1. Open **W8-A2-Bangalore** from your **Word Chapter 8** folder and save it as: **W8-A2-BangaloreRevised**

2. If necessary, display formatting marks; then mark the three main headings on page 1 (**Background**, **Climate**, and **Get in**) as main index entries.
3. Mark **By plane** as a subentry of *Get in*.
4. On page 6, mark **Landmarks** and **Temples** as main index entries.
5. Navigate to your **Word Chapter 8** folder and open **W8-A2-Concordance**; examine the file to see which entries will need to be marked in the next step and then close it.
6. Use the **AutoMark** button in the Index dialog box, together with **W8-A2-Concordance**, to mark additional index entries; turn off formatting marks.
Now you'll insert an index.
7. Scroll to the end of the document and insert a page break to create a blank page for your index.
8. Type **Index** at the top of the new, blank page and tap **Enter**.
9. Format *Index* with bold, 14 pt; position the insertion point on the blank line below the heading; and insert an index using the **Formal** format.
10. Scroll up to page 1 and select **Background**.
11. Choose **References**→**Index**→**Mark Entry**.
12. Mark these terms as subentries of *Background*:
 - **population**
 - **Garden City of India**
 - **IT industry**
13. Turn off formatting marks and update the index.
14. On page 1, select the **Background** heading.
15. Open the Paragraph dialog box and check **Keep with next** on the Line and Page Breaks tab.
16. Select the **Climate** heading and apply the **Keep with next** option.
17. Select the **Get in** and **By plane** headings and apply the **Keep with next** option.
18. Save and close the file.

APPLY YOUR SKILLS: W8-A3

Organize a Long Document

A Universal Corporate Events agent wrote a report on Basque country. Now it's time to enhance the document's readability. In this exercise, you will create a table of contents and an index. You will work with headers and footers and set up a page break pagination option.

1. Open **W8-A3-Basque** from your **Word Chapter 8** folder and save it as: **W8-A3-BasqueRevised**
2. If necessary, display formatting marks; then open the Styles task pane.
3. Scroll through the document, observe the heading styles, and then close the task pane.
4. To create a new page for the table of contents, insert a Next Page section break just before the heading *The Basque Country* on page 2.
5. Scroll up, position the insertion point in front of the section break, tap **Enter**, and insert an Automatic Table 2 table of contents.

6. Use the **Climate** link in the table of contents to jump to the *Climate* heading; type **Basque** in front of *Climate* and update the table of contents to reflect the change.
7. Create a custom table of contents by applying the **Distinctive** format.
8. Position the insertion point in section 2 (begins with *The Basque Country* heading), edit the header, break the link between sections 1 and 2, and insert a header using the **Blank style**.
9. Type **The Basque Country** in the Type Here area; close the header area.
10. With the insertion point in section 2, edit the footer and break the link between sections 1 and 2.
11. Insert a footer using the **Austin** style and format the starting page number to start at page 1; close the footer area.

Mark Entries and Create an Index

12. Mark index main entries and subentries using the headings indicated in this table:

Main Entry	Subentry
Features	Atlantic Basin
	Middle section
	Ebro Valley
Basque Climate	
Transport	Road
	Rail
	Airports
	Seaports

13. Turn off formatting marks, position the insertion point at the end of the document, and insert a page break.
14. Type **Index** and tap **[Enter]**; format the text with bold, 14 pt; position the insertion point on the blank line below the heading; and insert a Formal index.
15. Mark the **Cuisine** heading (page 4) as a main entry, turn off formatting marks, and then update the index.

Keep Text Together

16. Position the insertion point in front of the *Transport* heading (page 2) and insert the **Page Break Before** pagination option.
17. Because you changed pagination, update the table of contents and the index.
18. Save and close the file.



Project Grader

If your class is using eLab (labyrinthelab.com), you may upload your completed Project Grader assignments for automatic grading. You may complete these projects even if your class doesn't use eLab, though you will not be able to upload your work.

PROJECT GRADER: W8-P1

Enhancing the History of Board Games Document

In this exercise, you'll put some finishing touches on the History of Board Games document by adding a table of contents and an index. You'll then change heading levels and add index entries and follow by updating the table of contents and index.

1. Download and open your Project Grader starting file.
 - *Using eLab:* Download **W8_P1_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W8_P1_Start** from your **Word Chapter 8** folder.
2. On **page 2**, insert the **Confidential 1** watermark.
3. On **page 8**, use the **Keep with Next** pagination setting to keep the last two paragraphs together (the paragraph starting with *Additionally* and the quotation paragraph below it).
4. On **page 2**, insert a table of contents in the empty space near the top of the page using the **Automatic Table 2** format.
5. Change the following headings to the Heading 2 style:
 - **United States** heading on **page 4**.
 - **21st Century** heading on **page 5**.
6. Update the table of contents using the **Update Entire Table** option.
7. On **page 9**, insert an index in the empty paragraph below the *Index* heading using the **Classic** format and leaving all other index settings at the default values.
8. Mark the following index main entries, leaving all other Mark Index Entry settings as the defaults:
 - **Catan** (two instances)
 - **Stratego** (one instance)
9. Update the index.
10. On **page 1**, insert a **Built-in Banded** footer with the **Different First Page** option turned on.
11. Replace the footer page number with the text: **TAYLOR GAMES**
12. On **page 2**, insert a **Built-in Banded** footer with the **Different First Page** option turned on.
13. Save your document.
 - *Using eLab:* Save it to your **Word Chapter 8** folder as **W8_P1_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 8** folder as: **W8_P1_Submission**

PROJECT GRADER: W8-P2

Enhancing the Corvette History Document

You've been asked to add large document enhancement features to the Corvette History document. In this exercise, you'll use footers, a table of contents, and index features to do so.

1. Download and open your Project Grader starting file:
 - *Using eLab:* Download **W8_P2_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W8_P2_Start** from your **Word Chapter 8** folder.
2. On **page 2**, insert the **Confidential 1** watermark.
3. On **page 2**, insert a table of contents using the **Automatic Table 1** format.
4. Open the **W8_P2_Concordance** document from your **Word Chapter 8** folder.
5. Add these entries to the end of the concordance document:
 - **Boattail**
 - **Ramjet**
 - **Wonderbar**
6. Save the concordance document to your **Word Chapter 8** folder as **W8_P2_ConcordanceEdited** and then close the document.
7. Use the **Index AutoMark** feature to open **W8_P2_ConcordanceEdited** as the Index AutoMark file.
8. On **page 15**, insert an index in the empty paragraph below the *Index* heading using the **Classic** index format. Leave all other index settings at the defaults.
9. On **page 2**, insert the **Built-in Banded** footer with the **Different First Page** option turned on.
10. In **Section 1**, change the header & footer page number format to roman numerals (i, ii, iii...).
11. In **Section 2**, insert a **Built-in Banded** footer making the footer the same on the first page.
12. In **Section 2**, start the footer page numbering at: **1**
13. Update the table of contents using the **Update Page Numbers Only** option.
14. Update the index.
15. Save your document.
 - *Using eLab:* Save it to your **Word Chapter 8** folder as **W8_P2_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it to your **Word Chapter 8** folder as: **W8_P2_Submission**

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W8-E1 That's the Way I See It

As a small-business owner, you want to offer your customers a document that provides an in-depth, categorized overview of your products. If you were a bookstore owner, for example, you might categorize books by genre (e.g., history, biography, fiction). Start a new document and save it as:

W8-E1-ProductDescriptions

Decide on the type and name of your business. Type an introduction (three to four sentences) for each main product category, providing longer content for the subcategories. Format main categories with Heading 1 and give each at least three subcategories (Heading 2). Your document should be at least seven pages, including a cover page, a table of contents, and index (ten main entries and at least three subentries). Be sure to insert a Next Page section break between the table of contents and the body of the document. Also include multiple footers (page numbering starting at page 1 in section 2, no footers in section 1) and the Keep Text Together option (keep heading lines together with the paragraph following headings; apply this feature at least twice). You may copy content from the Internet, but cite your sources.

W8-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you want to provide your customers with in-depth information for their spring gardens, focusing on fruits, vegetables, and legumes. Start a new document and save it as: **W8-E2-SpringPlanting**

Create an introduction (three to four sentences). Do online research to create at least three subcategories for each category. Format the category headings with Heading 1 and the subcategories with Heading 2. Provide detailed information, such as the best growing conditions for a particular type of tomato. Your document should be at least seven pages, with a cover page, table of contents, and index. You may copy content from the Internet, but cite your sources. Insert a Next Page section break between the table of contents and the document body. Use page numbers in the section 2 footer, starting at page 1; use no footer in section 1. Your index should include twenty main entries and at least five subentries.

W8-E3 Demonstrate Proficiency

Stormy BBQ is planning to sell a book about BBQ cooking, and you have been asked to provide the research, which you will do online. Feel free to copy content from online sources—just remember to cite your sources. Start a new document and save it as: **W8-E3-BBQBook**

The book will include three main categories: BBQ Grills and Tools, BBQ Tips and Techniques, and BBQ Recipes. Each category heading should be formatted with the Heading 1 style. Create a short introduction (three to four sentences) for each main category. Based on your research, identify at least two subcategories for each category; format the subcategory headings with the Heading 2 style. Use a Next Page section break to designate a cover page and table of contents as section 1 and the rest of the document as section 2. Insert a header with the company name that appears only in section 2. Insert a page number footer that appears only in section 2 and that starts numbering at page 1. Create an index of at least fifteen terms of your choice, including main entries and at least five subentries.

WORD

9

Collaborating in Word



The Internet makes it easy for project teams to collaborate when drafting documents.

Team members can exchange documents across the country as easily as across the hall. Several features make collaboration activities more efficient. For example, you can track all of the changes made to a document by each team member and combine these changes into a single document for review. In this chapter, you will work with these collaboration tools.

LEARNING OBJECTIVES

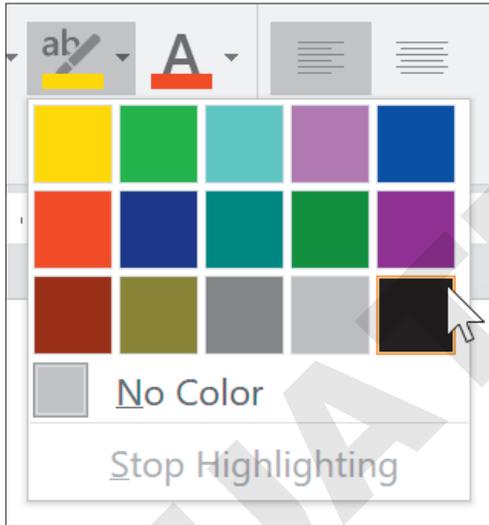
- ▶ Use the highlighter tool
- ▶ Track your changes to a document
- ▶ Review tracked changes from others
- ▶ Send emails from Word
- ▶ Review changes from multiple reviewers
- ▶ Compare documents with no tracked changes

Project: Collaborating on a Manual

As a member of the human resources department, you have been working to finalize the Raritan Clinic East Policies and Procedures Manual. It's now ready for review by personnel in the human resources department. As others review the manual, they will use collaboration tools to mark suggested changes. Some reviewers will insert comments to identify their recommendations, while others will use the Track Changes feature to mark suggested edits. Some will highlight text to identify wording that needs revising. Your task will be to review all suggested edits and comments and finalize the document for printing.

The Highlighter

The highlighter pen works just like its real-life counterpart (except you can easily erase the highlighting). The pen applies a transparent color to the text background and offers a variety of highlighting colors. You can color-code the highlights you use in a document if you wish, such as highlighting notes to yourself in yellow and “waiting for information” reminders in green.



There are multiple highlighter colors to choose from.

 Home → Font → Text Highlight Color 

DEVELOP YOUR SKILLS: W9-D1

In this exercise, you will highlight a note to yourself and a reminder that you are waiting for additional information from the Finance department.

1. Open **W9-D1-PolicyManual** from your **Word Chapter 9** folder and save it as: **W9-D1-PolicyManualRevised**
2. With the insertion point at the beginning of the document, do a search for: **Pediatric General Medicine**

3. On page 2, position the insertion point in front of *Pediatric*.
4. Type this text: **Chin has more information about these specialties.** Spacebar
5. Choose **Home**→**Font**→**Text Highlight Color**  **menu button** ▼ and then choose **Bright Green** from the gallery.

When the mouse pointer is in the body of the document, it looks like a highlighter pen.

6. Drag the pen across the text you just added to highlight it.
7. Click **Text Highlight Color**  to turn off the pen.

Notice that the color on the button face reflects the most recently used color.

Tip!

Tapping Esc also turns off the pen.

8. Press Ctrl+End or scroll to the end of the document and type this text: **Check with Finance to see if they have information to add.**
9. Select the sentence and choose **Text Highlight Color**  **menu button** ▼→**Yellow**.
This highlights the selected text and changes the button color to yellow.
10. Save the file.

Tracking Changes to a Document

Track Changes is one of the most useful tools for **collaborating** with team members as you pass documents back and forth. Reviewers can track changes while they edit, and the originator can see who is making what changes in the document and either accept or reject the suggested changes.

Reviewers can also use the Comment feature to leave messages in a document as a means of collaborating with the originator. For example, reviewers may want to explain to the originator why they are making a particular change.

 Review→Tracking→Track Changes 

Review and Collaboration

In today's world, when requests for instant feedback are the norm, knowing the typical online reviewing process can ensure that you're well prepared to be a valuable contributor. Reviewers use Track Changes to mark edits and add comments. It's important to use Track Changes so the originator can see all of the proposed edits. Files may be passed back and forth among team members via email, cloud storage, or other means.

Viewing Tracked Changes

You have options for viewing edits made to documents using Track Changes. The method you choose is a matter of personal preference.

- ▶ **Inline:** Edits are marked directly within sentences and paragraphs. Deleted text is colored and marked through with a line; added text is underlined and in a different color.
- ▶ **Balloons:** Comments and edits appear in balloons on the right side of the document (called the markup area). Each balloon identifies the person who made the edit and the type of edit made—inserted text, deleted text, etc.

Note!

The balloons method is the primary method used in this chapter.



View the video “Display Options for Track Changes and Comments.”

Setting the Username and Initials

Track Changes uses information set up in the Word Options dialog box to identify the username for edits made to a document. For this reason, whenever you collaborate on a document in which Track Changes is used, make sure your username and initials are set correctly.

☰ Review→Tracking dialog box launcher →Change User Name

Setting Reviewer Ink Colors

Track Changes can display different colors to distinguish the edits of each reviewer who works on the document. Each reviewer can specify colors for his or her comments and tracked changes. This makes it easier to rapidly identify changes submitted by a specific reviewer. It also allows you to keep a consistent color for a reviewer you work with frequently, rather than settling on colors that may be assigned automatically.

Warning!

Changing your reviewer ink colors in this way will change these settings permanently until you change them again.

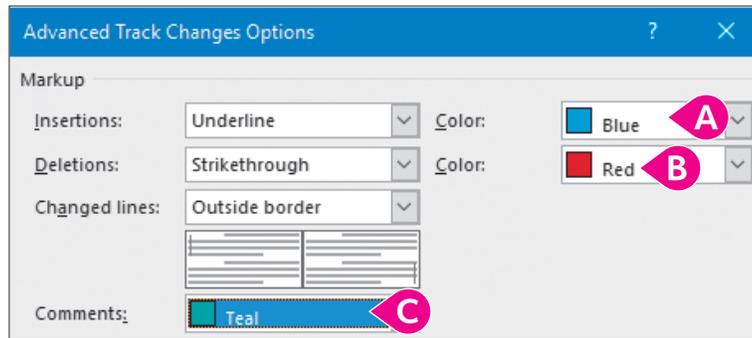
☰ Review→Tracking dialog box launcher →Advanced Options

DEVELOP YOUR SKILLS: W9-D2

In this exercise, you will turn on Track Changes, change the tracking colors, and set the user's name and initials for the revised Raritan Clinic East policy manual.

1. Choose **Review→Tracking dialog box launcher**  and click the **Advanced Options** button.

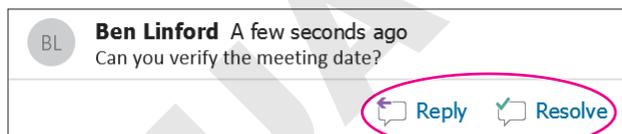
- Follow these steps to choose options for your reviewer ink color settings:



- Set the color for insertions to **Blue**.
 - Set the color for deletions to **Red**.
 - Set the color for comments to **Teal**.
 - Click **OK**.
- Click the **Change User Name** button at the bottom of the Track Changes Options dialog box and, if necessary, enter your username and initials.
 - If you want to override the settings from the current Microsoft Account, click the checkbox below the Initials field for **Always use these values regardless of sign in to Office**, and click **OK** twice.

Adding Comments to a Track Changes Document

The Comment feature is a great collaboration tool to use in conjunction with Track Changes. The Reply button in the comment balloon allows reviewers and originators to communicate back and forth during the editing and reviewing process. For example, a reviewer might want to point out the reason for a deletion. The Resolve button is meant for reference only, meaning a user may mark a comment as resolved so other users know the issue has been corrected.



☰ Review → Comments → New Comment

DEVELOP YOUR SKILLS: W9-D3

In this exercise, you will choose the balloon display for tracking changes, and then you will insert a comment and make revisions to the document.

- Save your file as: **W9-D3-PolicyManualRevised**
- If necessary, choose **Review** → **Tracking** → **Display for Review** and then choose **All Markup**.

3. Choose **Review**→**Tracking**→**Track Changes**  and, if necessary, display formatting marks.
4. Choose **Review**→**Tracking**→**Show Markup**→**Balloons** and, if necessary, choose **Show Revisions in Balloons**.

Deleted text, comments, and formatting changes will appear in balloons in the markup area. Added text will be underlined in the body.

5. Scroll to page 2. In the last paragraph on the page, select **Referral** at the beginning of the paragraph.
6. Choose **Review**→**Comments**→**New Comment** .
7. Type this text in the comment balloon: **Indent to match other paragraphs.**
8. In the same paragraph, locate and select the text (**see Appendix A**) in the next line; delete it.
The deleted text appears in a balloon in the markup area, and a gray change bar appears in the left margin to help reviewers locate changes.
9. Follow these guidelines to continue with deletions:
 - Search for the word **see** to locate each additional cross-reference to an appendix.
 - Delete the ten other cross-references for Appendices B–K.
 - Delete extra spaces between words where appropriate.
10. Search for **Patient Management Procedures** and then position the insertion point at the end of the heading.
11. Follow these steps to insert introductory text for the heading:

Patient Management Procedures 

 → It is important that standard management procedures be used to maintain the standards of treatment that each patient deserves. These procedures are described in the following pages. 

-  Tap **Enter**.
-  Tap **Tab** and then type the text shown here.
-  Notice the gray change bar in the left margin that helps locate changes.

Notice the formatting balloons in the markup area. Although the font is the same for the other body text, the style is different from the heading; therefore, the difference is noted.

12. Close the Navigation pane and save the file.
-

Reviewing Tracked Changes

Reviewers' tracked changes are only suggestions; tracked changes don't become permanent unless the originator accepts them. Originators can also reject a reviewer's suggestions.

This rejects the currently selected change.

Navigate to the previous or next change using these buttons.

Use this to accept the currently selected change.

These options appear when you click the Accept menu button ▼. Similar choices are available on the Reject button.

Tip! You can right-click a proposed change and choose an Accept or Reject command from the pop-up menu.

Displaying Tracked Changes

You can display tracked changes in four distinctive views. Depending on the type of detail you want to focus on, each view offers specific advantages.

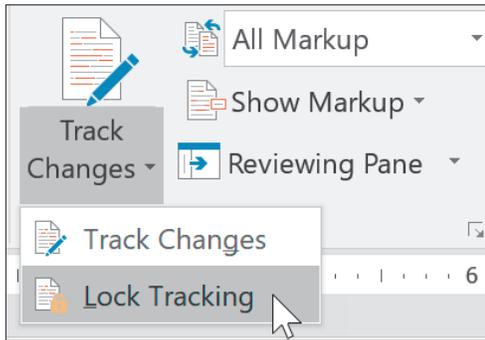
VIEWS FOR TRACKED CHANGES	
Markup	Description
Simple Markup	This shows where a change occurred with a red change bar in the margin. Clicking the change bar displays the markup details.
All Markup	This option shows all markups.
No Markup	This hides all markups and displays a final document appearance with the proposed changes.
Original	This shows the original document and hides all markups.

☰ Review → Changes → Accept or Reject

☰ Review → Tracking → Display for Review

Lock or Unlock Tracking

You can use a password to lock tracking in a document. Doing so will prevent anyone from turning Track Changes on or off, or accepting or rejecting any changes. To unlock this feature, you'll need the password you initially used when locking.



Review → Tracking → Track Changes  menu button ▼ → Lock Tracking

DEVELOP YOUR SKILLS: W9-D4

In this exercise, you will use different markup views to display the document. Then you will review tracked changes to the document, accepting some changes and rejecting others.

1. Save your file as: **W9-D4-PolicyManualRevised**
2. Choose **Review** → **Tracking** → **Display for Review**  → **Original** and then scroll through the document.
The document now appears as it did before changes were made.
3. Choose **Display for Review**  → **All Markup** and then scroll through the document.
Notice the balloons in the markup area on the right. Deleted text, comments, and formatting changes appear in balloons, while inserted text is underlined in the body.
4. Choose **Display for Review**  → **Simple Markup** and then scroll through the document.
Red change bars appear in the margin where changes occurred. Clicking the change bar displays all the changes in detail; clicking it again hides the details. This is a good view for a document with lots of changes.
5. Choose **Display for Review**  → **No Markup** and then scroll through the document.
This view helps you see what the final document will look like.

Accept and Reject Changes

6. Position the insertion point at the top of the document.
 7. Choose **Review** → **Changes** → **Next** .
- This turns on All Markup view and then jumps to and highlights the text you added to the document. This is a good addition, so you will accept it.*

8. Choose **Accept** .

The change marks are removed from the new paragraph, and the focus moves to the next change—the formatting balloon associated with the change you just accepted.

9. Choose **Accept** .

10. Choose **Accept**  again.

Lock and Unlock Tracking

11. Choose **Review**→**Tracking**→**Track Changes menu button** ▼→**Lock Tracking**.

12. In the Lock Tracking window that appears, enter **1234** as your password, enter it again in the second box to confirm, and click **OK**.

Notice that the Track Changes button, as well as the Accept and Reject buttons, are greyed out.

13. Choose **Review**→**Tracking**→**Track Changes menu button** ▼→**Lock Tracking**.

14. In the Unlock Tracking window that appears, enter **1234** as your password and click **OK**.

All buttons related to track changes are once again available.

15. Choose **Next**  to skip the comment and move to the next change, the deleted reference to Appendix A.

16. Choose **Reject** .

The deleted text is restored, and you move to the next tracked change.

17. Reject each deleted reference to an appendix.

The insertion point returns to your comment.

18. Choose **Review**→**Comments**→**Delete** .

19. Choose **Review**→**Tracking**→**Track Changes**  to turn off the feature.

20. Position the insertion point at the beginning of the paragraph starting with *Referral* (bottom of page 2) and tap **Tab** to indent the first line.

21. Save the file.

Saving and Sending Files

Before reviewers can do their jobs, you must get the document to them. You can use the Internet to share your document in several ways:

- ▶ Email
- ▶ Microsoft **OneDrive**
- ▶ Network drive

This chapter uses email as the method for sharing files.

 File→Share→Email 

DEVELOP YOUR SKILLS: W9-D5

In this exercise, you will send an email with a copy of the policy manual document attached. For this example, you will send the attachment to your own email address.

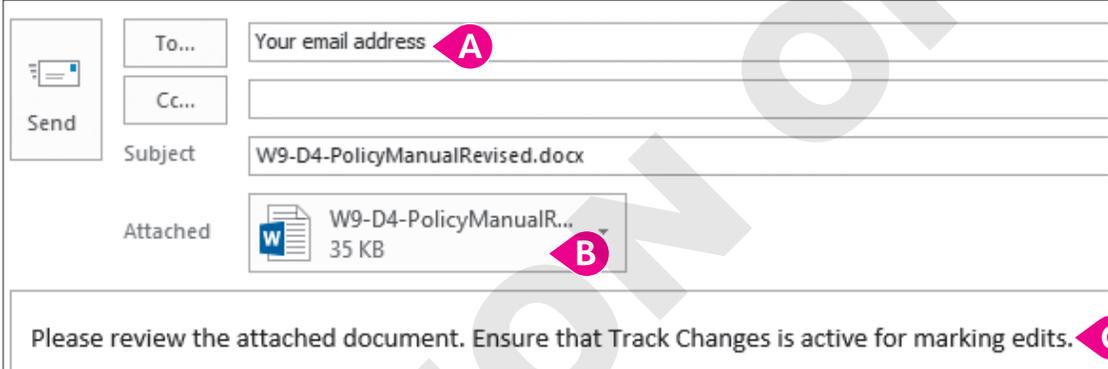
1. Choose **Review**→**Tracking**→**Track Changes** .

Turning on the feature helps ensure that the reviewers will use Track Changes.

2. Choose **File**→**Share**→**Email**  and then choose **Send as Attachment**.

3. Follow these steps to complete the email form:

If your user ID was not set up as a user with an Outlook account, you will see a message saying that no profiles have been created. If so, just dismiss the message, turn off Track Changes, and read through the rest of the exercise.



- A Enter your actual email address here (don't type the text shown).
 - B Verify that the attachment appears here.
 - C Add this message for the reviewers.
4. Send the email.
5. Choose **Review**→**Tracking**→**Track Changes**  to turn off Track Changes.

Reviewing Changes from Multiple Reviewers

If you set up a document to track changes, you can send copies for review by others. As reviewers make revisions, their changes are tracked. When they send you their edited copies, you can combine the tracked changes into a single document. Each reviewer's changes are marked in a different color so you can recognize each reviewer's input. After the changes are merged, you can navigate through the combined document and accept or reject edits from all users at one time.

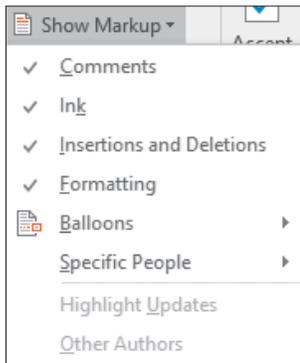
The Reviewing Pane allows you to see all your reviewers' changes in a simple list format. You can display the Reviewing Pane either horizontally or vertically. You can jump to specific edits made within the document by clicking them in the Reviewing Pane.

 Review→Compare→Compare →Combine

 Review→Tracking→Reviewing Pane 

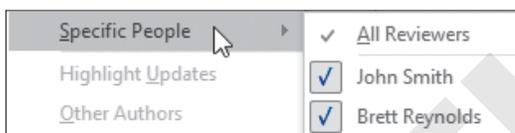
Displaying Specific Markups and Reviewers

There are numerous options for displaying tracked changes for combined documents. For example, you may want to look at only the insertions and deletions suggested by reviewers. If you don't need to keep track of formatting changes, you may wish to turn off the Formatting option so you won't be prompted for formatting changes.



☰ Review → Tracking → Show Markup 

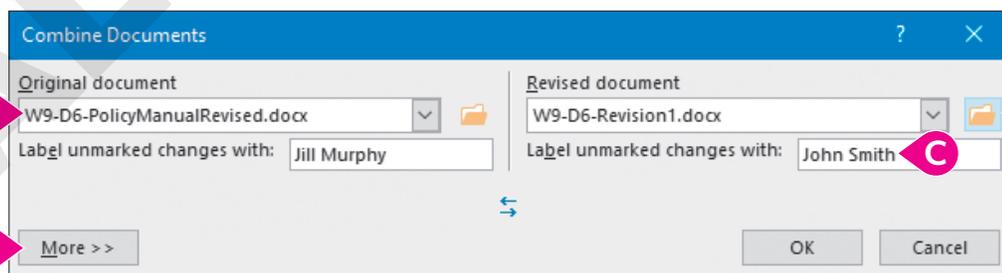
If you combine two reviewer documents with the original, you can choose to see changes from both at once, or, at times, you may wish to focus on just one reviewer. Do that by removing the checkmark in front of the other reviewer's name.



DEVELOP YOUR SKILLS: W9-D6

In this exercise, you will combine proposed changes from two reviewers with the original document. You will also explore additional features used for working with combined documents.

1. Save your file as: **W9-D6-PolicyManualRevised**
2. Choose **Review** → **Compare** → **Compare**  and then choose **Combine**.
3. Follow these steps to begin combining documents:



- A Choose **W9-D6-PolicyManualRevised** here.
- B Click **Browse**, select **W9-D6-Revision1** from your **Word Chapter 9** folder, and click **Open**.
- C Type **John Smith** here, replacing any existing text if applicable, so you'll know who suggested any unmarked changes.
- D Click **More >>** to expand the dialog box.

Note!

If Track Changes is not turned on, the reviewer's name doesn't appear with the change. Normally changes are tracked, and the name does not need to be entered in the dialog box.

4. Follow these steps to control document display:

- A** Ensure **Word Level** is active.
B If necessary, choose **Original Document**.

The *Word Level* option causes the entire word to be highlighted, even if only one character or punctuation mark changes. This makes it easier to spot small edits. Now John Smith's proposed edits are embedded in the original document, ready for review.

5. Click << **Less** to collapse the dialog box and then click **OK**.

Hide Source Documents

6. Click **Compare** , slide the mouse pointer to **Show Source Documents**, and then, if necessary, choose **Hide Source Documents**.

This creates more room on the screen.

7. Choose **Compare**  and then choose **Combine**.
 8. In the Original Document field, choose **W9-D6-PolicyManualRevised**.
 9. Click the **Browse** button next to the Revised Document field, select **W9-D6-Revision2** from your **Word Chapter 9** folder, and click **Open**.
 10. Type **Brett Reynolds** in the Label Unmarked Changes With field and click **OK**.

Brett Reynolds' edits are now displayed with the original and John Smith's edits.

Turn On the Reviewing Pane

11. If necessary, choose **Review**→**Tracking**→**Reviewing Pane**  menu button ▼, and then choose **Reviewing Pane Vertical**.

The Reviewing Pane (labeled Revisions at the top) summarizes the proposed changes from both reviewers.

12. Scroll down the Reviewing Pane to the suggested change by Brett Reynolds, where he deleted *attending*.
 13. Click **attending** in the Reviewing Pane and notice that the document scrolls to the location of that change.

Notice the Deleted: attending balloon in the markup area.

14. Click **Close**  at the top of the Reviewing Pane.
 15. Press **Ctrl**+**Home** to move to the top of the document.

16. Review all changes to the document:
 - Delete all comments and accept all formatting changes.
 - Accept all edits by John and Brett with one exception: On page 3, John deleted a space between (see Appendix B) and Children. Reject that change.
17. Save the file as **W9-D6-Combined** and then close it.

Comparing Documents

Sometimes documents sent for review are returned with no visible edits. Reviewers might turn off Track Changes so the edits they make are not immediately evident. To determine whether edits have been made, you can use the Compare feature. It enables you to merge two documents into one file; then the documents are examined and automatically marked up using Track Changes so you can locate edits.

To Combine or Compare?

The basic procedures are the same for comparing and combining documents, but each command has a different use.

The Combine command allows you to combine the tracked changes from one or multiple reviewers in one document, and then you can go through the single document to accept or reject the changes.

The Compare command is designed for comparing two documents: one edited version, in which the reviewer did not use Track Changes, and the original. If you attempt to use the Compare feature to add a second reviewer's document, you will be advised that it will automatically accept the first person's changes before comparing the second edited document. Thus, you won't have the option of accepting or rejecting changes from the first reviewer.

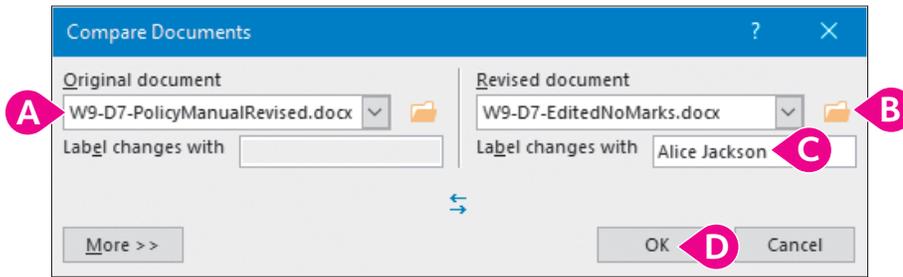
 Review → Compare → Compare  → Compare

DEVELOP YOUR SKILLS: W9-D7

In this exercise, you will compare an original document with a document received from a reviewer that appears to have no changes in it.

1. Open **W9-D6-PolicyManualRevised** from your **Word Chapter 9** folder and save it as: **W9-D7-PolicyManualRevised**
2. Choose **Review → Compare → Compare**  and then choose **Compare** from the menu.

3. Follow these steps to compare this file with another document:



- A** Choose **W9-D7-PolicyManualRevised** as the original document.
 - B** Click the **Browse** button for the revised document, navigate to your **Word Chapter 9** folder, and choose **W9-D7-EditedNoMarks**.
 - C** Type **Alice Jackson** here to identify the reviewer.
 - D** Click **OK**; click **Yes** if asked if you want to continue with the comparison.
4. Scroll through the document and observe Alice's edits.
You won't accept and reject changes in this example.
5. Save the file as **W9-D7-AliceEdits** and exit Word.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W9-R1

Encourage Good Bugs with Companion Planting

Kids for Change is sponsoring a Master Gardener's seminar, and you have researched companion planting. In this exercise, you will use the highlighter to place reminders in your document, add comments, and track and review changes. You will also email your document as an attachment.

1. Open **W9-R1-CompanionPlant** from your **Word Chapter 9** folder and save it as: **W9-R1-CompanionPlantRevised**
2. If necessary, display formatting marks; then position the insertion point at the end of the first paragraph and tap **Enter**.
3. Type this text: **Make copies on 3-hole punched paper.**
4. Choose **Home**→**Font**→**Text Highlight Color**  menu button ▼→**Turquoise**.
5. Drag the mouse pointer, which now appears as a highlighter pen, across the sentence you just typed.
6. Click **Text Highlight Color** to turn off the highlighter and then position the insertion point at the end of the document.
7. Type this text: **Reminder: Check with Ilsa to see if lupine and savory attract lady bugs.**
8. Select the sentence and then choose **Home**→**Font**→**Text Highlight Color** menu button ▼→**Bright Green**.

Customize Your Track Changes

9. Choose **Review**→**Tracking dialog box launcher** and then click **Change User Name**.
10. If necessary, enter your username and initials, click **OK**, and then click **Advanced Options**.
11. Choose these colors and then click **OK** twice:

Markup Setting	Value
Insertions	Pink
Deletions	Dark Blue
Comments	Violet

Work with Comments and Track Changes

12. Move to the top of the document and select the word **March** in the third line of the first paragraph.
13. Choose **Review**→**Comments**→**New Comment**  and type this text: **Do we have a specific date yet?**
14. Scroll down to the *Tomatoes + Cabbage* combination and select the last word, **leaves**.
15. Click the **New Comment** button and type: **Did Ilsa verify that this combination really works?**

Now you'll turn on Track Changes and make some editing changes.

16. Choose **Review**→**Tracking**→**Track Changes** .
17. In the first sentence below the *Companion Planting* heading on page 1, select **makes for** and type **produces** in its place.
18. In the fifth line of the same paragraph, select **mate** and type **pair** in its place.
19. In the first line of the *Radishes + Spinach* section on page 2, select **yor** and type **your** in its place.
20. Scroll down to the *Collards + Catnip* section, position the insertion point at the end of the sentence, tap Spacebar, and type: **And it will make your cat very happy!**
21. Position the insertion point at the end of the *Marigolds and Melons* section, tap Enter, and type: **Asparagus + Basil: Seems to encourage lady bugs.**
22. Bold the text **Asparagus + Basil:**
Now you'll review the document in various Track Changes views.
23. Choose **Review**→**Tracking**→**Display for Review**  menu button ▼→**Original** and scroll through the document.
The document now appears as it was before tracking changes.
24. Use the same technique to experiment with **Simple Markup**, **No Markup**, and **All Markup**, leaving it set at **All Markup**.
Now you will respond to comments and accept and reject the changes as you are playing the role of the reviewer.
25. Position the insertion point at the top of the document.
26. Choose **Review**→**Changes**→**Next** .
- The insertion point moves to the first comment.*
27. Click **Reply**  in the comment balloon and type: **I'll check with Ilsa.**
28. Choose **Next**.
The insertion point moves to the tracked deleted words makes for.
29. Choose **Accept** .
- The focus moves to the added word produces.*
30. Choose **Accept**.
31. Accept the deletion of *mate* and the addition of *pair*.
The insertion point moves to the added Asparagus + Basil information.
32. Choose **Reject** .
- The insertion point moves to the next comment.*
33. Click **Reply** in the bottom of the comment balloon and type: **I'll check with her.**
34. Choose **Next** and accept the deletion of *yor*, the addition of *your*, and the addition of *And it will make your cat very happy!*

Send a Document for Review

35. Make sure Track Changes is still on.

Remember, you want to ensure that reviewers use Track Changes.

36. Choose **File**→**Share**→**Email**  and then choose **Send as Attachment**.

If your user ID was not set up as a user with an Outlook account, you will see a message saying that no profiles have been created. If so, just dismiss the message, turn off Track Changes, and read through the rest of this exercise.

37. In the email form, enter your email address in the To field and change the subject to:
Companion planting document attached for review.

The document is already attached.

38. Type the email body text: **Please be sure Track Changes is turned on when you review the document.**

39. Click **Send** and then choose **Review**→**Tracking**→**Track Changes** to turn it off.

40. Save and close the file.

REINFORCE YOUR SKILLS: W9-R2

Combine and Compare Tracked Changes

Kids for Change is planning to participate in California Coastal Cleanup Day. You've researched some information on why this is important, and now your document has been reviewed by two other members. In this exercise, you will analyze the reviewers' edits and comments to finalize your document.

1. Open **W9-R2-CleanCoast** from your **Word Chapter 9** folder and save it as:
W9-R2-CleanCoastRevised
2. If necessary, choose **Review**→**Tracking**→**Display for Review** →**All Markup**.
3. Choose **Show Markup**  and then slide the mouse pointer to **Balloons** and, if necessary, choose **Show Only Comments and Formatting in Balloons**.
4. Choose **Review**→**Compare**→**Compare** →**Combine**.
5. Choose **W9-R2-CleanCoastRevised** from the Original Document drop-down list.
6. Click **Browse** on the right side of the dialog box, navigate to your **Word Chapter 9** folder, and open **W9-R2-CleanCoastElla**.
7. Click the **More** button to expand the dialog box and make sure **Word Level** and **Original Document** are chosen, click the **Less** button to collapse the dialog box, and then click **OK**.
8. Click **Compare** , slide the mouse pointer down to **Show Source Documents**, and, if necessary, choose **Hide Source Documents**.
9. Combine the second document, **W9-R2-CleanCoastNed**, with **W9-R2-CleanCoastRevised** and click **OK**.

10. If necessary, position the insertion point at the top of the document and then follow these guidelines to review the changes:
 - Accept all additions and deletions made by Ella and Ned.
 - Reply to Ned’s first comment with: **I’ll contact one of the Park School teachers.**
 - Reply to Ella’s comment with: **We should incorporate that in the report.**
 - Reply to Ned’s second comment with: **Are you willing to follow up on this?**
11. Save the file as **W9-R2-CoastEllaNed** and then close it.

Compare Docs

12. Open **W9-R2-Pups** from your **Word Chapter 9** folder and save it as: **W9-R2-PupsRevised**
13. Choose **Review**→**Compare**→**Compare**→**Compare**.
14. Choose **W9-R2-PupsRevised** from the **Original Document** drop-down list.
15. Click **Browse** under Revised Document and open **W9-R2-PupsArthur** from your **Word Chapter 9** folder.
16. Type **Arthur Menendez** in the Label Changes With field on the right and click **OK**.
17. Make sure the insertion point is at the top of the document.
18. Choose **Next** .

The first change is a little difficult to see—a comma was added following donors.
19. Accept the change and then continue through the document, accepting each addition and deletion.
20. Click **OK** when the message appears indicating there are no more changes.
21. Save the file as **W9-R2-PupsCompare** and then close it.

REINFORCE YOUR SKILLS: W9-R3

Collaborate in Word

Kids for Change will have a booth at a local farmer’s market next month where the group will talk about the importance of buying locally grown food. It is preparing a handout that discusses the significance of buying local, and now the document will be reviewed by two members. In this exercise, you will share the file with reviewers using Word’s email and then combine tracked changes from two reviewers. Then you will compare with another document from a reviewer who forgot to use Track Changes.

1. Open **W9-R3-BuyLocal** from your **Word Chapter 9** folder and save it as: **W9-R3-BuyLocalRevised**

First, you will turn on Track Changes to ensure that the reviewers use it, and then you will email the document.
2. Choose **Review**→**Tracking**→**Track Changes** .
3. Choose **File**→**Share**→**Email** →**Send as Attachment**.

In this example, you will send the email to yourself. If your user ID is not set up as a user with an Outlook account, you will see a message saying that no profiles have been created. If so, just dismiss the message, turn off Track Changes, and read through the rest of the email portion of the exercise.

4. In the email form, enter your email address in the To field and change the Subject to: **Global research attached**
5. Type the following in the email body and then click **Send: Please review and propose any changes you would like.**

Combine Tracked Changes from Two Reviewers

6. Choose **Review**→**Compare**→**Compare**→**Combine** and, in the Original Document field, choose **W9-R3-BuyLocalRevised**.
7. On the right side of the dialog box, click **Browse**, open **W9-R3-BuyLocalMarjorie**, and then click **OK**.
8. Choose **Compare**→**Combine**.
9. In the Original Document field, choose **W9-R3-BuyLocalRevised**.
10. Browse for and open **W9-R3-BuyLocalSerge** and then click **OK**.
11. If necessary, position the insertion point at the top of the document.
12. Use **Next**  and **Accept**  to review and accept all proposed changes.
13. Reply to Serge's comment about the number of copies with this text: **I'll check to see how many we made last year.**
14. Reply to Marjorie's comment with this text: **I know she is looking into it. I don't think she has heard back from them yet.**
15. Save the document as **W9-R3-BuyLocalCombined** and then close it.

Compare Documents

You've received the last edited document from Margo Meyers, but she did not use Track Changes. You will use the Compare feature to locate the changes.

16. Open **W9-R3-Obesity** and save it as: **W9-R3-ObesityRevised**
17. Choose **Review**→**Compare**→**Compare**→**Compare**.
18. In the Original Document field, choose **W9-R3-ObesityRevised** and, on the right side of the dialog box, browse for **W9-R3-ObesityMargo**.
19. Type **Margo Meyers** in the Label Changes With field and then click **OK**.
20. Scroll through the document and observe Margo's edits.
You agree with all of the changes, so you'll accept them all at once.
21. Choose **Accept**  menu button ▼→**Accept All Changes**.
22. Save the file as **W9-R3-MargoEdits** and then close it.

Apply Your Skills

APPLY YOUR SKILLS: W9-A1

Create a Report on Crete

Universal Corporate Events is adding Crete to its Mediterranean tour offerings. You've prepared a report about Crete, and now you're asking a colleague to review it. In this exercise, you will use the highlighter and Track Changes to edit the document and then send it on for further review.

1. Open **W9-A1-Crete** from your **Word Chapter 9** folder and save it as: **W9-A1-CreteRevised**
2. Position the insertion point at the end of the paragraph below the Crete heading and type:
Spacebar**The Roman and Turkish remnants are worth adding to the tour.**
3. Highlight the sentence with pink.
4. Open the Track Changes Options dialog box, click **Change User Name**, and, if necessary, enter your username and initials.
5. Click **Advanced Options** and choose these colors:

Markup Setting	Value
Insertions	Green
Deletions	Red
Comments	Turquoise

6. Select the city name **Heraklion** in the first bullet point.
7. Use the **New Comment** button to insert this comment: **A quick stop in Heraklion to see Knossos would be nice.**
8. Select the city name **Elounda** at the beginning of the fifth bullet point and insert this comment: **A good spot for celebrity watching.**
9. Turn on Track Changes and, in the fourth line of the paragraph below the *Crete* heading, replace *was* with: **were**
10. In the next line, replace *place* with: **island**
11. In the second line of the second bullet point, replace *Brits* with: **British**
12. Scroll to page 2 and locate the second-from-the-last bullet point about the city of Rethymno.
13. Position the insertion point after the space at the end of the paragraph and type: **There is a daily ferry from Athens.**
14. Ensure **All Markup** is active in the Display for Review field and then position the insertion point at the top of the document.
Now you'll play the role of the reviewer.
15. Use **Next** and **Accept** to find and accept all editing changes.

16. Create an email using these guidelines:
 - Use Word's Email feature to send the file as an attachment.
 - Insert your email address in the To field.

If your user ID is not set up as a user with an Outlook account, you will see a message saying that no profiles have been created. If so, just dismiss the message, turn off Track Changes, and read through the rest of this exercise.

- Change the subject to: **Crete Review**
 - Add this message in the body of the email: **I hope my comments are helpful.**
 - Send the email.
17. Save and close the file.

APPLY YOUR SKILLS: W9-A2

Prepare a Report on Whistler Blackcomb

Universal Corporate Events has a client who wants to reward outstanding employees with a ski vacation, and you've been researching Whistler Blackcomb. In this exercise, you will combine the documents from two reviewers into your original. Then you will use the Compare feature with a document that was reviewed without Track Changes.

1. Open **W9-A2-Whistler** from your **Word Chapter 9** folder and save it as: **W9-A2-WhistlerRevised**
2. Ensure the Display for Review feature is set to **All Markup**.
3. Choose **Show Markup**→**Balloons** and, if necessary, choose **Show Revisions in Balloons**.
4. Combine your original document with Colleen's revised document, **W9-A2-WhistlerColleen**, and enter **Colleen Chase** in the Label Unmarked Changes With field.
5. Combine your original document with Anthony's revised document, **W9-A2-WhistlerAnthony**, and enter **Anthony Nichols** in the Label Unmarked Changes With field.
6. Choose **Compare**→**Compare**, slide the mouse pointer to **Show Source Documents**, and, if necessary, choose **Hide Source Documents**.
7. If necessary, position the insertion point at the top of the document.
8. Accept all changes made by Colleen, Anthony, and Jill, except the change in the first paragraph of the article where Colleen changed kilometers to miles; reject both the deletion and the addition.
9. Save the file as **W9-A2-WhistlerColleenAnthony** and close it.

You have received suggested changes from a colleague, Mel. However, Mel did not use Track Changes, so you will use the Compare feature to highlight the changes.
10. Open **W9-A2-SanDiego** from your **Word Chapter 9** folder and save it as: **W9-A2-SanDiegoRevised**
11. Compare **W9-A2-SanDiegoRevised** in the Original Document field with **W9-A2-SanDiegoMel** and type **Mel Johnson** in the Label Changes With field.
12. Scroll through the document, check the changes, and then accept them all at once.
13. Save the file as **W9-A2-SDCompared** and then close it.

APPLY YOUR SKILLS: W9-A3

Collaborate on a Cabo San Lucas Brochure

Universal Corporate Events has asked you to conduct research for a marketing brochure on Cabo San Lucas. In this exercise, you will make changes to your original document and send it to reviewers. Then you will combine and compare the reviewed documents.

1. Open **W9-A3-Cabo** from your **Word Chapter 9** folder and save it as: **W9-A3-CaboRevised**
2. Make sure **Show Revisions in Balloons** is selected on the Balloons submenu in the Show Markup drop-down list.
3. Open the Track Changes Options dialog box and make sure your username and initials appear in the Word Options dialog box.
4. Change the colors in the Advanced Track Changes Options dialog box as follows:

Setting	Value
Insertions	Bright Green
Deletions	Turquoise
Comments	Dark Red

5. Turn on Track Changes.
6. Below the *See* heading, replace the last word in the first paragraph, *abundant*, with: **plentiful**
7. In the fourth line of the first bullet point, replace *allows for* with: **provides**
8. In the second line of the next bullet point, enter a comma after *old* and delete the word **and**.
Now you will review your changes.
9. Position the insertion point at the top of the document and then use the **Next** button to move to and reject the *abundant* deletion and the *plentiful* addition.
10. Accept the rest of the changes.
11. Select **Submarine** in the second bullet point below the heading *Scuba Diving & Watersports*, and then add this comment: **This looks like a fun activity. Let's check it out.**
12. Save the file.

Check Track Changes Options and Email Files

13. Check that Display for Review is set to **All Markup**.
14. Use the Email feature and the Send as Attachment option to send the document for review following these guidelines:

If your user ID is not set up as a user with an Outlook account, you will see a message saying no profiles have been created. If so, dismiss the message and go to the next step.

- Enter your own email address in the To field.
- Change the Subject to: **Cabo Review**
- Enter this email body text: **Please make sure Track Changes is turned on.**
- Send the email.

Combine Tracked Changes and Compare Documents

15. Use the Combine feature to combine these documents:
 - The original document is **W9-A3-CaboRevised**.
 - The first revised document is **W9-A3-CaboAudrey** (enter **Audrey Ellis** in the Label Unmarked Changes With field).
 - The second revised document is **W9-A3-CaboJose** (enter **Jose Santos** in the Label Unmarked Changes With field).

16. Accept all changes by you, Audrey, and Jose at once.

17. Save the file as **W9-A3-CaboCombo** and close it.

You recently completed a report on Singapore, which was reviewed by your colleague Ellen. She forgot to use Track Changes, so you will use the Compare feature to assess her changes.

18. Open **W9-A3-Singapore** and save it as: **W9-A3-SingaporeRevised**

19. Compare this file with **W9-A3-SingaporeEllen**.

20. Enter **Ellen Pledger** in the Label Changes With field.

21. Review the changes and then accept them all.

22. Save the file as **W9-A3-SingCompared** and then close it.



Project Grader

This chapter does not include Project Grader exercises. Project Grader content is based on the learning objectives for a chapter, and sometimes those learning objectives cannot be accurately graded by the system. Objectives from this chapter that can be accurately graded may be included in later chapters, if applicable.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W9-E1 That's the Way I See It

Your business professor has assigned you to prepare a report on the best business opportunities for the coming year. To begin, choose a business that appeals to you. Then create a short introduction (four to five sentences) summarizing your reasons for choosing the business. Search the Internet and copy content of one to two pages on business prospects, citing your sources. Save the file as: **W9-E1-Biz**

Create two copies of the file (give them the names **W9-E1-BizJohn** and **W9-E1-BizJorge**, respectively). Turn on Track Changes and revise the document using your own ideas. Do the same for the "Jorge" document, making different revisions than you did for John. Combine the revised files with your original file. Note that, because you created the John and Jorge files yourself, your name will appear as the reviewer in all cases. Accept and reject revisions as you see fit and then save and close the file.

W9-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you are researching recent articles on business opportunities in landscaping to determine future growth potential. Create a report of one or two pages using online content (citing your sources). Provide a short introductory paragraph (four to five sentences) summarizing the outlook for the landscaping business. Save your file as **W9-E2-Landscape** and then make a copy, naming it: **W9-E2-LandscapeArt**

Begin to share the document with Art via email from within Word. Fill out the email form. Make up Art's email address and a subject. When complete, tap **PrtScn** and paste the screenshot into a new Word document saved as: **W9-E2-Email**

Close the email form without sending. For the "Art" document, revise the document without Track Changes. Insert at least one comment and then save the document. Compare your original with the "Art" file. Note that, because you created the "Art" file yourself, your name will appear as the reviewer. Display the Reviewing Pane in a vertical alignment and then tap **PrtScn**. Add the screenshot to your "Email" document. Accept and reject revisions as you see fit and include a reply to Art's comment. Save and close the file.

W9-E3 Demonstrate Proficiency

Stormy BBQ plans to hold a BBQ Festival. You've been asked to conduct online research to gather ideas for the festival. Using your own ideas and content from online articles, create a report of one or two pages (citing your sources). Provide an introductory paragraph (four to five sentences) summarizing the purpose of the festival. Save the report as **W9-E3-Festival** and then make a copy, naming it: **W9-E3-FestivalCarla**

Change the reviewer ink setting for insertions, deletions, and comments to red. Take a screenshot and paste it into a new document saved as: **W9-E3-Ink**

Using Track Changes, make revisions to the "Carla" file, including at least one comment, and then save it. Combine the "Carla" file with your original. Note that, because you created the "Carla" file yourself, your name will appear as the reviewer. Accept and reject changes as you see fit and insert a reply to the comment. Highlight one sentence with bright green and then save the file.

Glossary

bookmarks Selection of text or other objects identified by a name and location; enable quick navigation through long documents

Building Blocks Another term for Quick Parts; usually refers to Quick Parts that provide a traditional part of a newsletter or article, such as pull quotes and sidebars

collaborating Working together with other people to edit and complete a document

color sets A subset of themes; determine which colors are applied to various document elements as part of the overall theme aesthetic

concordance A list of terms used to mark words or phrases in a document that are to be included in an index

font sets A subset of themes; determine which fonts are applied to header and body text as part of the overall theme aesthetic

nonbreaking hyphens or spaces Hyphens or spaces inserted between two or more words to keep those words together on the same line

OneDrive A service offered by Microsoft that provides free online storage to those who have a Microsoft Account ID; allows you to get and share files from anywhere on any device

Quick Parts Reusable text and/or graphic elements that can be customized and inserted into documents

style sets Used to change font and paragraph properties, interact with themes; most effective when used in conjunction with the Styles gallery

watermark Text or images placed in the header of a document so it appears faintly behind document text and graphics

widow/orphan control Prevents placing the last line of a paragraph at the top of the next page (widow) or the first line of a paragraph at the bottom of a page (orphan); ensures there are at least two lines of a paragraph at the top or bottom of a page

wildcard characters Special characters used in place of unknown characters when conducting a search

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